

BANKWEST CURTIN ECONOMICS CENTRE

ARE WE CHINA-READY?

Chinese Tourism in Western Australia

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Executive summary

Chinese tourism to Australia has grown substantially since the start of the millennium, and this group of travellers is now the top international tourism spender. This report looks at the characteristics of Chinese visitors coming to Western Australia, their detailed travel experiences while here and whether WA is China-ready to take advantage of the boom.

We use a range of data sources to capture information on Chinese visitor travel experiences, including Chinese travel websites, Tourism Research Association (TRA) surveys, intercept surveys at Perth International Airport, and industry workshops.

Chinese visitors are young, with money to spend

In terms of visitor characteristics and demographics, the report shows 75 per cent of Chinese visitors to Western Australia are aged 20 to 40 years, and spend on average almost \$500 per night when they stay in Australia.

WA is a natural beauty, although transport is not always convenient

Chinese visitors see WA as a destination to enjoy an unpolluted environment, to see the distinctive flora and fauna, and to experience the natural beauty of the coast and inland regions.

The report recommends trip itineraries suitable for Chinese visitors and provides consumer and market insights that could be used to inform tourism industry management and influence government policies and strategies.

From spatial mapping, the report finds a noticeable triangle of travel, with Perth at the centre and points extending out to iconic Western Australian landmarks including the Pinnacles, Busselton Jetty and Wave Rock. Beyond this area, Karijini National Park, the Murchison River, Kalgoorlie and Esperance were also popular.

Wave Rock was particularly popular due to marketing of the landmark to would-be travellers in China. While this has translated to strong visitor numbers, feedback from tourists was that it was a long way to travel without many other drawcards, suggesting transport and infrastructure may be needed in areas outside of mainstream tourist visitation.

Small changes could make WA more 'China-ready' for tourists

While WA may not be China-ready yet, this report suggests policy changes the WA Government can make to capture this growing market. Extending trading hours to 6.30pm on weeknights and additional earlier trade on Sundays is one way the WA Government could increase the \$291 million already being spent in the State by Chinese visitors each year.

The report also recommends tourism operators develop and market their products to appeal to this growing market. Of the 22 tourism providers surveyed, 78 per cent did not have any Asian language skills or training and 44 per cent had no training or experience in the Asian market.

Participation by tourism providers in courses such as the ChinaReady® accreditation program, and informal online learning, could see an increase in Chinese visitor number. However, some government assistance will be required if we are to fully capitalise on the opportunities this market brings to the WA economy.

Key findings

WA Chinese holiday visitors: Tourism Research Association data

Visitor characteristics

- 75% of WA Chinese visitors were aged between 20 to 40 years, with 30% between 25 to 29 years.
- Before arriving in Australia, 84% of Chinese visitors researched the nation's tourist attractions online.

Travel patterns in WA

- Over 79% of Chinese holiday visitors came to Perth directly from China, but only 18% then stayed.
- Between 2010 and 2016 the March quarter was the peak season for arrivals.
- Only 7% of Chinese visitors used commercial group travel services.
- Chinese visitors prefer to stay in hotels of less than 4 stars (23%), with friends or relatives (22%), luxury hotels and resorts with four stars or greater (15%), backpacker accommodation (13%), and rent houses/flats (11%).

WA Chinese visitors: Online user-generated travel diary data

Why do Chinese visitors choose WA?

- Chinese visitors see WA as a destination to enjoy an unpolluted environment, to see the distinctive flora and fauna, and to experience the natural beauty of the coast and inland regions.
- Perth city is considered to be unique and unlike other cities in China.
- Perth is known for three features: *The City of Isolation* (alluding to its reputation as the most geographically isolated capital city in the world), *The City of Swans* and *The City of Lights*.
- Perth shares the same time zone as all of China.
- Discounted airfares.

Negative comments from Chinese trip diaries

- Distance represented a problem for some visitors. Travelling to scenic spots often involved long and tiring travel, leaving little time to relax and enjoy the destination.
- Frequently, diarists complained of the inconvenience of retail trading hours and public services closing too early, particularly public transport. This meant they couldn't always use the available time in their tight travel schedules.

Insights on spending habits, food and accommodation

- Overall, more female visitors wrote of their spending habits than males. However, males may have a greater propensity to spend more.
- The diaries indicated that bed and breakfast and Airbnb were their most popular accommodation choices. In addition, some specific hotels, such as the Pan Pacific, Jurien Bay Hotel-Motel, Albany Apartments, Best Western Hotel and The Royal Hotel were mentioned frequently by Chinese visitors in their trip diaries.
- Approximately 80% of diarists wrote that they were very satisfied with the food and beverages in WA, although some complained that restaurants in WA were too expensive.

WA Chinese visitors: The Perth Airport intercept and online (PAIO) survey

Travel profile of PAIO survey respondents

- For most visitors to WA (81.8%), the purpose of their trip was primarily recreation, school-visit trips, and visiting friends and family.
- 88.2% of survey respondents chose Perth as their first port of call and 76.6% their last port of call during their visit to Australia.
- Over 26% departed from Guangzhou, but this was the home city for only 4.8% of respondents. Guangzhou is a major travel hub on mainland China.

Travel information sources

- Travel purchasing decisions were more often influenced by recommendations from friends and family, followed by online research.

Popular activities and routes of PAIO survey respondents

- The top 5 most popular activities were: taking photos, visiting beaches and rivers, self-guided tours, while the least popular were group tours, sailing and surfing.
- Spatial mapping of routes taken by visitors while in WA show a distinct triangle with the Perth region at the centre, extending out to The Pinnacles, Busselton Jetty and Wave Rock.

Findings from informal interviews with local tour operators and guides

- While many Chinese visitors to WA are relatively wealthy, international tourism is still considered a luxury product, meaning affordability and value for money are key objectives.
- A typical Chinese diet contains a large proportion of rice and noodles, stir-fried and steamed vegetables, and simply prepared meats, so Western cuisine can sometimes be overly rich. While most visitors are happy to try new food experiences, they would equally welcome at least one familiar, home-style meal each day.
- Accommodation prices have gradually dropped due to the mining downturn. It is now much easier to book accommodation in regional areas for inbound tour groups. These prices are similar to those in other states.

Observations of tour groups in action

- Tour guides need a unique set of attributes including patience and approachability, while keeping the group to a tight schedule; understanding their clients' needs even when those clients may come from a different cultural background and may have limited English; be knowledgeable of the history and features of the

places they are visiting; and a range of practical skills from first aid, navigation, negotiation, to the ability to tell a good yarn.

- There is little regulation of training, competency, and working conditions of tour guides.

Suggestions from PAIO respondents

- Retail trading hours could be extended to 6:30pm every day of the week, with additional earlier trade on Sundays.
- Free public WIFI is assumed, but is often not available, even at some hotels. For a largely family-oriented society, it is important for visitors to stay in touch with friends and family in China and to share their trip in the moment, but this is not always possible.
- In Perth there are almost no multi-lingual signs outside the tourist precincts nor in places where they are most needed such as airports, public transport and at popular attractions.
- The Perth CAT buses provide a good service but stop too early in the evening. Extending the service in line with restaurant closing hours (9:00pm or 10:00pm) would be beneficial.

Are we China-ready?

- We're not China-ready, but we want to be!
- The major barriers to being China-ready are the lack of Chinese speaking staff, low levels of ITC competency, insufficient Chinese tourism business networks and a lack of understanding of the Chinese market.

Introduction

The aim of this report is to identify the characteristics of Chinese visitors and their detailed travel experiences in Western Australia (WA). These experiences include popular attractions visited, trip duration, travel routes, transport modes, accommodation and restaurants used, spending habits, information sources, overall satisfaction, detailed comments on what they like and dislike, and suggestions on further improvements for WA destination development from Chinese visitors and tour operators. We take advantage of publicly-accessible information, as well as the International Visitor Survey data from Tourism Research Australia (TRA) and our own intercept survey administered at Perth International Airport and online. This data allows us to provide consumer and market insights as well as recommendations for tourism industry management and to inform State policy and strategies. At the end of project, we also conducted an industry stakeholder workshop in the South West region of WA to disseminate the results and gain insights on how China ready local tour operators and business might be.

Accelerated historical growth of the WA economy has been attributed to several factors including the resources sector, international migration and tourism (Syed *et al.*, 2013, Regional Australia Institute, 2015). With the current decline in the mining boom, WA's resources sector workforce is expected to shrink through to 2025 as the sector transitions from a construction to operational phase (Deloitte Access Economics, 2014). Further, From April 2017 to April 2018, the unemployment rate increased by 0.6 per cent in WA, to 6.4 per cent (Duncan *et al.*, 2018). In this context, it is encouraging that tourism has been recognised as "a new gold mine in WA" (Australian Bureau of Statistics (ABS), 2015). At the end of 2017, over \$7.5 billion was estimated to have been spent by 10.6 million visitors to WA (Tourism WA, 2018b). Among international visitors to the State, China was WA's sixth largest inbound market for visitor arrivals (58,600 visitors) and the largest market for total expenditure (\$291m) (Tourism WA, 2018a). Tourism WA has indeed identified China as one of the most important emerging markets for international tourist arrivals into WA (Hall, 2015).

Currently, there is very limited knowledge on Chinese tourists in WA, and their travel patterns have not been explored and documented. Furthermore, visitor statistics reveal that Chinese visitors rarely travel beyond the Perth metropolitan area. Only 12 per cent visited the South West region (SWR) with fewer visiting other regions outside of Perth in 2015 (Tourism WA, 2016). As such, it is urgent and important to conduct detailed research to support the targeted regional tourism development for the Chinese tourist market in WA. This is a call echoed globally (Jørgensen *et al.*, 2017).

Therefore, we particularly focus on local industry stakeholders' knowledge and opinions on their experiences of Chinese tourism in the SWR, home to popular tourist attractions such as the Margaret River wine region and beaches. The SWR's tourist attractions are a focus to enhance the local economy, a common strategy for government policy-makers (Hall & Lew, 2009). Tourism is touted as an industry that 'brings financial viability and cultural vibrancy' to regional communities (ARTN, 2018). The SWR tourism industries have also been urged to become 'China ready' under the global accreditation program (Tourism Council, 2018).

Firstly, this report provides a review of our current knowledge of Chinese tourists to Australia and WA in particular. Next, the methods of research are then presented. These findings are provided over three chapters, reporting the findings from each stage of data collection: an analysis of the International Visitor Survey from the government body, Tourism Research Australia; Chinese social media analysis; and the intercept survey with Chinese tourists to WA administered at Perth International Airport and online. The fourth chapter discusses the findings of participants from a knowledge sharing session and survey of the South West region's tourism industry. Finally, these findings are compared, and conclusions and recommendations given.



Background

and methods

Background

This report addresses the following research questions:

- What is the profile of Chinese tourists who have visited tourist attractions in WA?
- What kinds of tourist attractions and destinations in regional WA are visited by Chinese visitors?
- What is the frequency and duration of Chinese visitors to these attractions?
- What is the visitor's degree of satisfaction in touring these attractions?
- What are the popular routes of Chinese visitors visit to WA?
- How do Chinese tourists travel to and around regional WA?
- What are the travel experience of the Chinese visitors in the WA context?

Chinese Tourism in Australia

The Chinese outbound market to Australia has grown substantially since 1999 when Australia received Approved Destination Status from the Chinese government (Ruhanen *et al.*, 2015). This market has shown continued growth, on average 13 per cent annually since 2002 (Ruhanen *et al.*, 2015). The latest Australian Bureau of Statistics' Overseas Arrivals and Departures Report (ABS, 2017) confirmed that 120,100 short-term Chinese visitors arrived in Australia during the previous 12 months. TRA (2017) distinguishes Chinese visitors by the purpose of their visit: holiday, business, visiting friends and relatives, and education/employment. Chinese holiday visitors represented 55 per cent (482,500) of total arrivals of Chinese visitors in Australia in 2016, with an average spend of approximately \$4,037 each per trip. Each Chinese holiday visitor spends on average around \$497 per night, more than a business (\$306) and an education visitor (\$160) combined (Tourism Australia, 2017, TRA, 2013a).

Studies show that Australia is a popular destination for Chinese tourists' due to its proximity to China (low cost airfares), perception as a safe destination, the natural landscape, unique wildlife, and famous icons (Hughes *et al.*, 2015; Ma *et al.*, 2016; Weiler & Yu, 2006). During their visits, Chinese visitors are interested in taking photographs, visiting beaches, experiencing the local lifestyle, and interacting with Australian animals (Packer *et al.*, 2014).

To date, Chinese tourists use the package tour market as their primary means of travel to Australia due to both convenience and reasonable pricing (Yu & Weiler, 2001). However, the independent traveller market has been growing (Hughes *et al.*, 2015), enabling Chinese tourists' greater autonomy in selecting where they visit and how long they stay.

Chinese Tourism in WA

WA's tourism statutory authority, the Western Australian Tourism Commission, operating as Tourism WA (and amalgamated with the portfolio of Jobs, Tourism, Science and Innovation in 2017), has sought to grow the Chinese market to WA since 2011 (Tourism WA, 2011). The Chinese market is perceived as high yield with fierce competition for this market across Australia.

Outcomes of TRA's International Markets Profiles Report released in March 2017 indicate that 43 per cent of Chinese travellers visit WA primarily for a holiday. Between 2015 and 2016 the estimated expenditure of Chinese visitors to WA increased by 9.3 per cent, the number of visitors increased by 17.4 per cent and number of nights spent per trip grew by 5.1 per cent.

Both industry and government in WA have taken specific steps to grow this lucrative market. Steps include direct marketing events in China; 'welcomes' and familiarisation visits to WA; training and information tools for WA tourism businesses, including a Mandarin language holiday planner; the opening of shops selling WA produce in key Chinese cities; and a travel planning smartphone application in Mandarin. While Chinese holiday visitors primarily visit Perth, only 9 per cent visit the Coral Coast directly north of Perth, and 7 per cent visit the State's South West (Tourism WA, 2017). Other more distant regions receive few Chinese visitors. Furthermore, WA appears to have a lower awareness within source markets in China despite the key advantages of shorter travel time and sharing the same time zone as Chinese cities. A study in 2016 by online travel site TripAdvisor found that WA was the ninth most searched destination in Australia, trailing behind other capital cities including Hobart and Adelaide (Le Messurier, 2017).

Methodology

We adopted a five-stage approach to better understand the travel experiences of Chinese visitors in WA, and to recommend tour packages and strategies to promote WA to China.

Stage one: Identify the characteristics and travel patterns of Chinese visitors through TRA's International Visitor Survey (IVS) data.

The IVS is conducted every year with 40,000 visitors aged 15 years and over, who stay in Australia for short-term periods. The survey samples are obtained from visitors in the airport lounges of Australia's largest cities (TRA, 2017). The survey collects approximately 100 tourism related data points including place of residence, group tours, travel patterns, transportation and accommodation details, expenditure, activities, and preferences (TRA, 2017).

The IVS database was filtered by the following settings: International visitors (*IVS Trips*), country of residence (*China*), main reason for visit (*holiday*), stopovers-destinations (*WA*) and period of arrival (*2010 to 2016*).

Two types of analyses were conducted on the IVS data: identification of visitors' characteristics and identification of trip characteristics and travel patterns for metropolitan and regional areas.

Stage two: Identify Chinese visitors' travel experiences based on user generated information using text mining methods

Nine tourist travel websites were used to extract tourist itineraries by searching for key words in Chinese script: 西澳 (Western Australia), 珀斯 and 柏斯 (both for Perth). A total of 666 travel diaries were collected from these websites. After inspecting these diaries manually, 215 had detailed trip information with 154 trips having complete records. The trip data included 2,267 trip records, 274 with accommodation information, 193 with food and restaurant information and 335 referring to WA attractions. Table 1 provides detailed information about the data collected. From the website information, we developed Chinese visitor profiles, itineraries, their accommodation, and restaurants used.

Table 1 Summary of Chinese visitor trip information from websites

ID	Website name (Mandarin and Westernised)	Website characteristics	Trip diaries		Information about website
			Number of web pages	Number of valid web pages	
1	马蜂窝 Mafengwo	Chinese tourist site	231	88	Semi-structured information and relatively complete trip information
2	携程 Ctrip	Chinese travel site	346	94	Semi-structured information and many missing trip information
3	猫途鹰 Trip adviser	Global travel site	2	1	Structured information
4	途牛 Tuniu	Specialised travel site	10	2	Simple summary
5	去哪儿 Qunar	Chinese travel site	34	20	Simple summary
6	穷游 Qyer	Chinese independent travel site	41	8	Semi-structured information and some information, which is hard to interpret
7	新浪旅游 Sina travel	Travel media module in Sina	2	2	Only two trip diaries found
8	飞猪 (阿里旅游) Alitrip	Travel media module in Alibaba	0	0	Mostly business trip information and no tourist trip itineraries
9	驴妈旅游网 Lv mama	Chinese independent travel website	0	0	Professional trip diary website, however, only trip information from trips to eastern Australia were found

We mapped and analysed this data to identify the reasons why visitors chose WA, their likes and dislikes, their preferences in retail buying, food and beverage, accommodation, destinations visited and duration. We also examined their cities of origin. Instead of using traditional graphs, this report also uses word clouds to highlight the diarists' emphatic use of words and terms to illustrate the impact of analysed online travel data.

Stage three: Identify Chinese visitors' travel patterns in WA using an intercept (face-to-face) and online survey.

We also conducted two sets of trip diary survey in order to reach broader cohorts of Chinese visitors in WA. This included an intercept (face-to-face) survey and online survey using the same questionnaire instrument. The content of trip diary surveys includes visitor profiles, travel mode, maps for recording destinations and attractions and the itineraries, the duration and satisfaction with attractions, information source, recommendations for further improvement of WA tourist destinations and other relevant information. The online survey was conducted between 12 April and 30 July 2017 and collected 81 usable questionnaires using *Wenjuanxin*, an online survey tool. We also conducted an intercept survey at the Perth International Airport from 1 to 30 July 2017 using the survey application *Qualtrics* and had 359 usable questionnaires completed.

Stage four: Determine and visualise Chinese visitor travel patterns using GIS technologies and determine popular travel itineraries.

Based on the travel related information collected from Chinese travel diary websites, and the intercept and online survey, we built a travel itinerary geodatabase using GIS technologies. Simple itinerary statistics were calculated and mapped, such as the frequency, duration and satisfaction of attractions, and the travel routes used by Chinese visitors.

We also determined the preferred travel routes and stop overs in terms of the frequency of use and time spent using the framework of the models developed by this study's Chief Investigator Xia and Zeepongsekul, based on Markov models (Xia *et al.*, 2011). The probability of tourist itineraries was estimated and the output of the model was used to suggest popular travel itineraries of Chinese tourists in regional WA.

Stage five: Deliver industry presentations and organise China ready regional workshops at key regional tourism centres.

We delivered two industry presentations as part of this project, which aimed to identify the barriers, knowledge and other gaps to understanding Chinese visitors and what issues stakeholders identified that need to be addressed to grow this market segment.

The first presentation at Bunbury was hosted by the Bunbury Chamber of Commerce and Industry (BCCI) on 5 December 2017, and the second, in Perth, was hosted by Tourism Western Australia with a title of 'Where do Chinese tourists go in Australia's South West and why?'. Following the presentation by Chief Investigator Xia at the BCCI, a workshop was conducted to collect information on how far tourism businesses in the South West are 'China ready'. Of the 60 who responded to the workshop and presentation call, 40 attended and 22 participated in the workshop and completed a short survey. Seventeen survey participants answered all the questions, with the other participants answered up to 90 per cent of the questions. We adopted the following methods for organising the workshop and analysing the data:

1. A stakeholder discussion was initiated where participants gathered at tables of up to six, with a set of informal guiding questions for members to discuss and then record their perspectives on project sheets, with a volunteer facilitator for each group.
2. A brief survey was conducted, based on the certification requirements contained within the China Ready accreditation program, and the research team's industry experience.
3. At the end of the presentation and workshop, the project sheets and surveys were collected. The findings were summarised manually since data coding was considered unnecessary for this size of cohort.

A background image of two young Chinese women smiling on a beach. The woman on the left is wearing a straw hat and a floral-patterned shirt. The woman on the right is wearing a dark top. The entire image has a blue overlay. A semi-transparent dark blue rectangle is positioned in the center, containing the title text.

Analysis

of WA Chinese holiday visitors:
TRA data

Analysis of WA Chinese holiday visitors: TRA data

The following summary draws on a range of data sources, including data from the 2010 to 2016 TRA IVS and a series of other reports from TRA, in order to assess the viability of Chinese holiday visitors in WA and to present detailed information for state tourism policy and other infrastructure policies.

WA's Chinese holiday visitors' characteristics

This section presents the general profile of Chinese holiday visitors based on our TRA data analysis.

Age: 75 per cent of WA holiday visitors were aged between 20 to 40 years, but of that, 30 per cent were aged between 25 to 29 years. However, this cohort contrasts with the TRA's 'Marketing Matters: China' publication which states that most Chinese visitors in Australia were aged between 45 to 59 years (TRA, 2013b).

Gender: 64 per cent female and 36 per cent male.

Marital status: Our analysis found that 55 per cent of Chinese holiday visitors were couples (married, de facto or living together) and 45 per cent were single (never married, divorced, separated or widowed).

The length of stay: WA's Chinese holiday visitors stay in the State an average of 19.43 nights. This average represents 41 per cent of the total nights spent in Australia as documented in 'Marketing Matters: China' Report (TRA, 2013b).

Use of Internet: Before arriving in Australia, 84 per cent of Chinese holiday visitors researched the nation's tourist attractions online.

Recurrent visitors: The finding of our IVS database analysis was that 52 per cent of WA's Chinese holiday visitors came to WA for the first time, reflective of TRA's 'Marketing Matters: China' report which found 53 per cent were first-time visitors in 2012 (TRA, 2013b).

75% of visitors were aged between 20 to 40 years.

52% of Chinese visitors came to WA for the first time.

Chinese holiday visitors' travel patterns in Western Australia

Only 1 in 5 visitors arriving in Perth, will stay in Perth.

This section discusses the findings of Western Australia's Chinese holiday visitors' city of arrival, patterns of visits, details of transport modes, accommodation and destinations based on the IVS from 2010 to 2016.

Over 79 per cent of Chinese holiday visitors came to Perth directly from China, but only 18 per cent of arrivals had 2, 3 or 4 stopovers in Australia. Only 1 in 5 visitors arriving in Perth, will stay in Perth (Table 2).

Table 2 WA's visitors' city of arrival in Australia

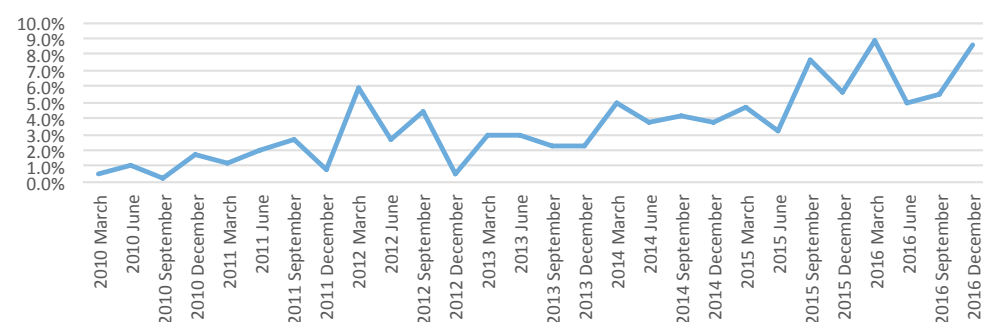
City of Arrival	Proportion
Perth	79.37%
Sydney	9.23%
Melbourne	8.06%
Brisbane	2.75%
Adelaide	0.59%
Total	100.00%

Source: TRA IVS data.

The March quarter is the most popular time of the year for Chinese holidaymakers to visit Perth.

The March quarter (January to March) was the peak period for Chinese holiday visits between 2010 and 2016 (Figure 1). The December quarter has also been showing significant growth in 2016.

Figure 1 Growth in the number of Chinese holiday visitors who arrived in Australia via Perth, 2010 to 2016



Source: TRA IVS data.

Over 50% of visitors use rental and private modes of transportation.

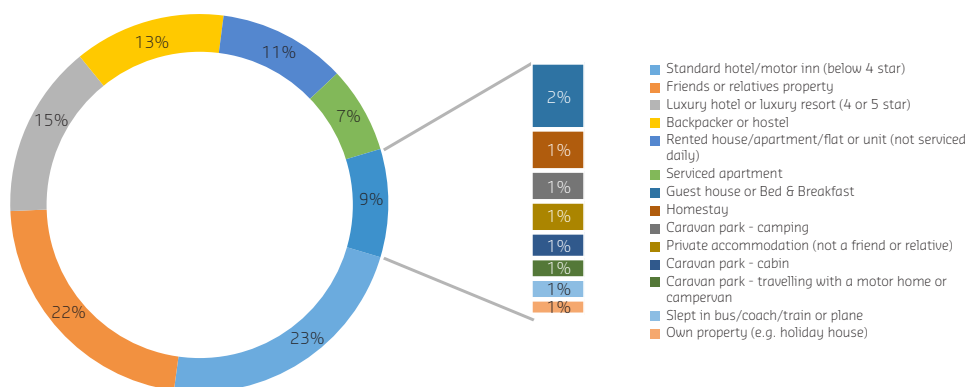
Visitors like to drive independently in WA. The use of rental and private cars together represents over 50 per cent of the preferred mode of transportation (Table 3). The use of tour buses is not common, and neither is the use of public transport. Only 7 per cent of Chinese visitors used commercial group travel services.

Table 3 Methods of transport in WA

Methods of transport	Proportion
Private vehicle or company car	34.65%
Rental car	26.98%
Taxi or chauffeur driven hire car	10.64%
Charter or tour bus	7.18%
Local public transport	6.93%
Aircraft	6.44%
Ship, boat or ferry	1.98%
Long distance coach or bus	1.49%
Shuttle or courtesy bus	1.24%
Self-drive motorhome or campervan	0.99%
Long distance train (non-suburban)	0.74%
Walking	0.50%
Other transport methods	0.25%
Total	100.00%

Source: TRA IVS data.

Figure 2 shows the accommodation types used by Chinese visitors. The top five accommodation types were: hotels with less than four stars (23%), with friends or relatives (22%), with friends or relatives (22%), luxury hotels and resorts with four stars or greater (15%), backpacker accommodation (13%), and rent houses/flats (11%).

Figure 2 Accommodation preferences

Source: TRA IVS data.

43.8 per cent of total outings by Chinese holiday visitors were within Perth City, which is significantly different from the other destinations. For example, the next favoured destination was Fremantle (5.55%), as seen in Table 4.

Table 4 Top 10 visited destinations

Ranking	Destinations	Visits %
1	Perth City	43.87%
2	Fremantle	5.55%
3	Margaret River	4.54%
4	Exmouth	4.03%
5	Albany	3.03%
6	Gingin - Dandaragan	2.35%
7	Northampton - Mullewa - Greenough	2.18%
8	Mandurah	2.02%
9	Bentley - Wilson - St James	2.02%
10	Geraldton	1.51%

Source: TRA IVS data.

In terms of destination and nights spent in an accommodation, 42 per cent of Chinese holiday visitors preferred Perth City, according to Tourism Council WA and ABS data. This finding reflects Table 6, where a significant fall occurs to the next ranked destination which is Murdoch-Kardinya suburban area of 8.74 per cent (Table 7).

Table 5 Top 10 destinations by nights spent

Ranking	Destinations	Nights %
1	Perth City	42.04%
2	Murdoch - Kardinya	8.74%
3	Victoria Park - Lathlain - Burswood	4.79%
4	Cannington - Queens Park	4.43%
5	Hamilton Hill	3.22%
6	Bentley - Wilson - St James	3.17%
7	Fremantle	2.24%
8	Leeming	1.74%
9	Applecross - Ardross	1.74%
10	Albany	1.60%

Source: Tourism Council WA 2014 'Experience Perth' tourism region; Australian Bureau of Statistics.



Analysis

of WA Chinese visitors: Online
user-generated travel diary data

Analysis of WA Chinese visitors: Online user-generated travel diary data

In this section, we discuss the findings around Chinese visitors in general, not just holiday makers. The data comes from online user-generated travel diaries from nine websites (see Background and Methodology above) following visitors' trips to WA. We then focus on the reasons why they chose WA, their likes and dislikes, their preferences in shopping, food and beverage, accommodation, destinations visited and duration, and their cities of origin.

Why do Chinese visitors choose WA?

Through the analysis of trip diaries, we discovered that Chinese visitors were influenced by their fellow online diarists. Diary comments contributed significantly to the decision to visit WA in the first place.

Reasons most frequently mentioned for choosing WA as a destination were to enjoy an unpolluted environment, to see the unique flora and fauna, and to experience the natural beauty of the coast and inland regions. It was also noted that Perth city itself was considered to be unique and unlike other cities in China.

Furthermore, Perth, was known for three features: *The City of Isolation* (alluding to its reputation as the most geographically isolated capital city in the world), *The City of Swans*, and *The City of Lights*, as frequently mentioned in the Chinese diaries.

Importantly, as well as scenic tourism, many respondents enjoyed the independence of self-driving tours, travelling in motor homes, and the unhurried and uncrowded nature of the cities, towns, and tourist activities.

For Chinese travellers, WA also offers a number of geographical advantages. With direct or one-stop flights to and from destinations in China, Perth is seen as a good first-and-only or last destination in an Australian trip. WA weather is also warm and mild during the peak travelling season (December to March) compared to the cold conditions in the heavily populated northern and eastern Chinese provinces. Perth also shares the same time zone with China, so jet lag is not a problem.

WA is also perceived as a safe destination with superior health and medical facilities, should the need arise.

Of note, many visitors said they preferred coming to WA because there seemed to be less Chinese visitors here compared to Sydney and Melbourne.

Multi-entry visas also make travel to Australia easier (Australian Embassy in China, 2017). A number of institutions and companies including Tourism Australia, China Southern Airlines, Scoot Airlines, Jetstar, QYER, GORE-TEX and Air Asia highlight that the Australian visa system offers a variety of promotions to attract Chinese visitors to Australia.

Therefore, affordability and convenience along with the natural scenic beauty are prime reasons visitors come to WA. Other reasons our respondents noted include:

- Visiting friends and relatives who are studying or living in WA. The diarists said they expected their friends to act as guides.
- Paradoxically, publicity surrounding the disappearance of the Malaysian Airlines Flight MH370 en route to Beijing in 2014, which led to an extensive seabed search off the coast of Western Australia, has raised the profile of the region to Chinese visitors.

Unique images of Perth:

- The City of Isolation
- The City of Swans
- The City of Lights

Advantages of Perth:

Same time zone
Peaceful and relaxing
Friendly and helpful locals.

A summary of negative comments from the Chinese trip diaries

Diarists said that the amount of construction in the Perth CBD detracted from its amenity. Other comments included that Perth International Airport was not as welcoming or usable as other airports through which they had passed. While some comments praised WA's affordability, others commented that accommodation and tour services were expensive compared to other places, such as Bali.

Distance represented a problem for some visitors. Travelling to scenic spots often involved long and tiring travel, leaving little time to relax and enjoy the destination. Some visitors noted the different sense of time between Chinese and Australians. Locals might describe an attraction as nearby or close, but travelling there might entail many hours driving.

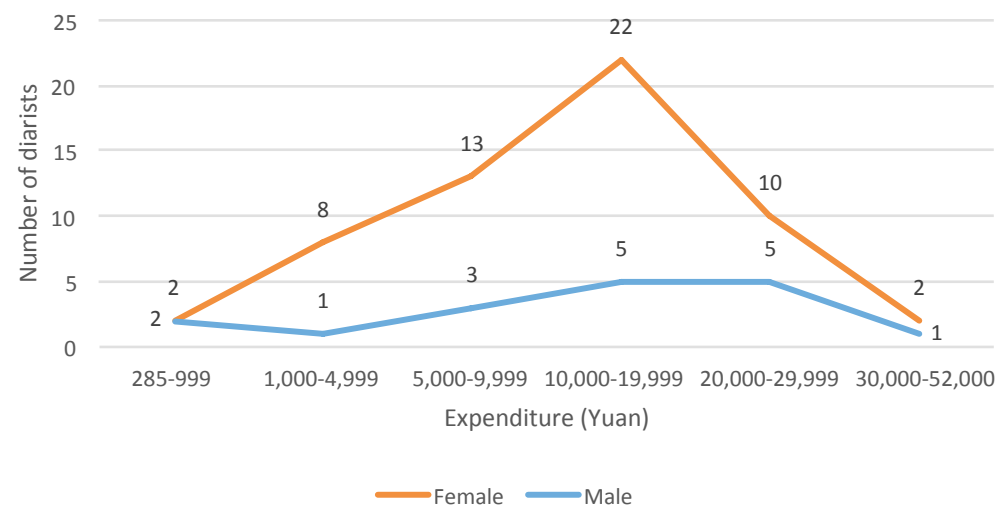
Frequently, diarists complained about inconvenient retail trading hours and the early shutdown of services such as public transport. For visitors operating on tight timeframes and budgets, these inconveniences were significant.

Ants, flies and intense sunlight were problematic for Chinese visitors used to milder conditions.

What did the Chinese trip diarists purchase?

Seventy-four diarists revealed their spending habits, with more females than males writing of their spending habits. Figure 4 indicates that female diarists, spending range peaked at \$2,000 to \$4,000 (¥10,000 to ¥19,999 Yuan) and tapered off to \$10,000 (¥52,000) for their WA trips, while males consistently spent around \$1,000 (¥4,999), peaking at \$4,000 through to \$6,000 (¥19,999 through to ¥29,999) then tapered off to \$10,000 (¥52,000). Of these numbers, 60 per cent of females had higher expenditure, but 65 per cent of males had the same high expenditure. This may indicate that males may have a greater propensity to spend at a higher end.

Figure 4 Average spending of female and male travellers



Source: Online user-generated travel diaries.

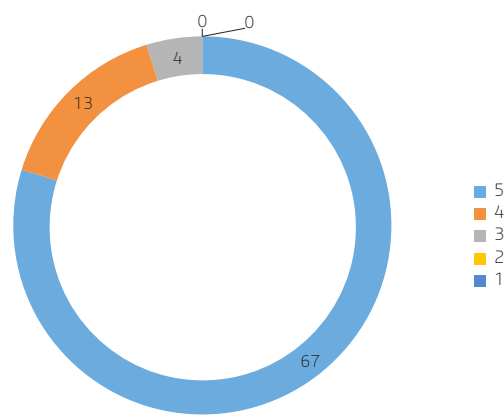
The diarists indicated popular spending areas were:

- **Food and drink:** nougat, honey, chocolate, jams, milk powder, grape wine and mango wine.
- **Healthcare products:** Jurlique, lanolin oil and supplements.
- **Popular brands:** UGG shoes, Esprit clothes and Nine West shoes. They also bought electronic products, especially the Apple iPhone.
- **Souvenirs:** commemorative coins, fridge magnets and handicrafts. Other products included opal jewellery, Chinese branded cigarettes, handmade sheepskin products, ceramic watches and sports shoes.

Food and beverage comments

Many diarists commented favourably on Western Australian food, beverage and dining. Of the 84 entrees analysed, approximately 80 per cent of diarists wrote that they were very satisfied with the food and beverages in WA (Figure 5). Restaurants were often named and evaluated. Approximately 175 restaurants were evaluated in these diaries including 111 authentic Western style restaurants and 29 Asian restaurants (Figure 6 and Figure 7).

Figure 5 Satisfaction towards restaurants and cafes



Source: Online user-generated travel diaries.

Positive comments included:

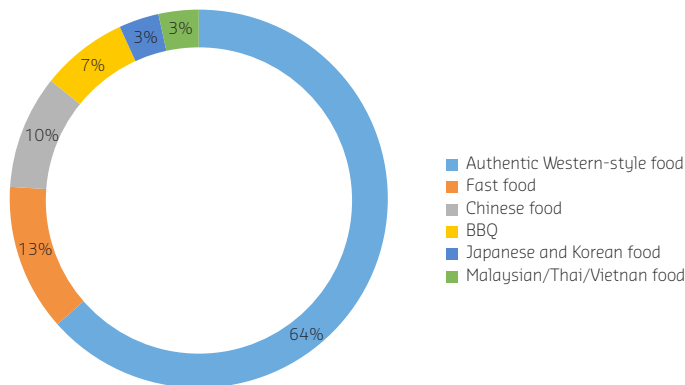
- WA food was fresh and available in a variety of cuisines. Seaside and riverside restaurants provided fresh seafood and dining facilities with beautiful views over the water.
- Seafood restaurants in particular seemed to give the most generous servings.
- Other notable food experiences included seafood BBQs, steak, lamb chops, prawns, ham burgers, pizzas, lobster feasts, mayonnaise and white wine.
- Family-owned and managed restaurants were found to be of good value and a pleasurable dining experience.

However, not all was positive:

- Some restaurants were too expensive.
- Fish and chips were fresh but often greasy.
- Some could not adjust to the richer Australian food.

Figure 6 illustrates the popular food, restaurants and cafes experiences of the diarists, with fish and chips and barbecues being the most popular. Dome Café, Kung Fu Kitchen and Joop Thai were recommended frequently by name.

Figure 6 Type of restaurants and cafes visited by travellers



Source: Online user-generated travel diaries.

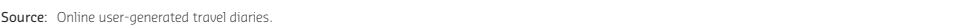
Figure 7 Popular food, restaurants and cafes



Source: Online user-generated travel diaries.

Figure 8 Popular accommodation choices

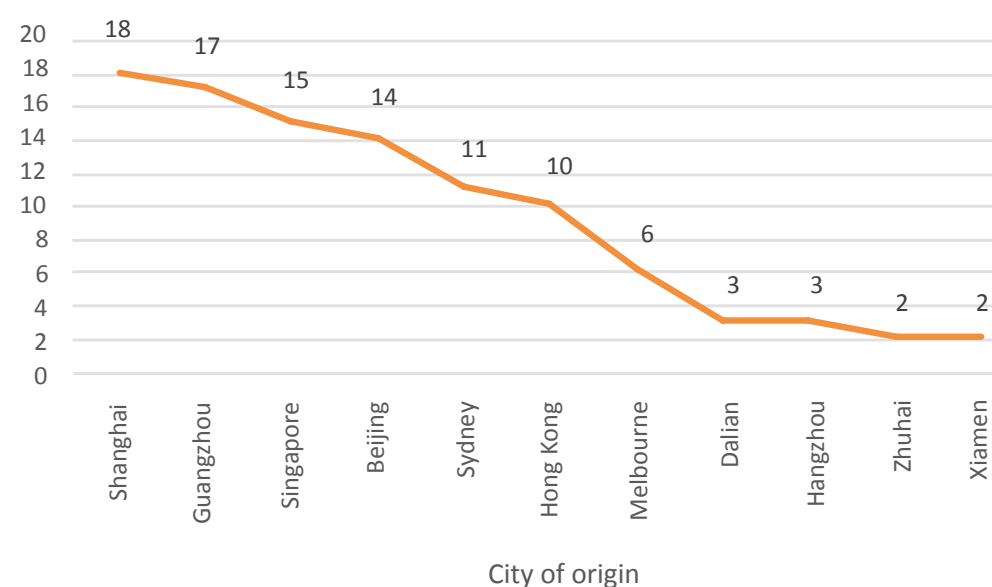
Joondalup Resort **Kalbarri Anchorage Caravan Park** **Billabong Homestead Motel** **Ocean View Motel** **Old Mill Motel Dongara**
Parmelia Hilton Perth Hotel **Four Points by Sheraton Perth** **Emu Point Motel** **Carleton caravan park**



Origins and stay duration of Chinese diarists

Figure 9 shows the city of origin of the diarists before they arrived in Perth. Shanghai and Guangzhou were the most popular cities of origin for tourists. Beijing, as the capital city in China, was the fourth most popular city of origin, following Singapore.

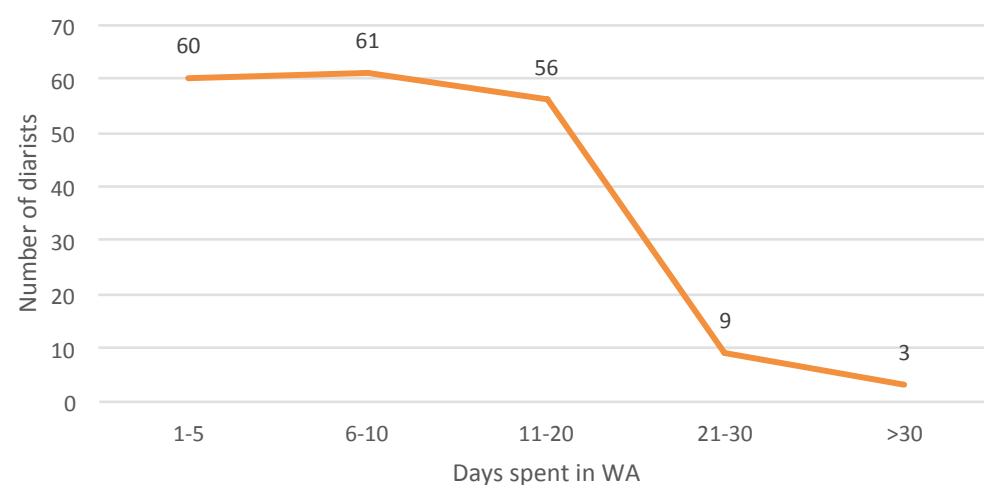
Figure 9 City of origin for diarists



Source: Online user-generated travel diaries.

According to their trip diaries, approximately 94 per cent of Chinese visitors stayed in WA less than 20 days, with trips under 10 days being taken by 64 per cent of all visitors.

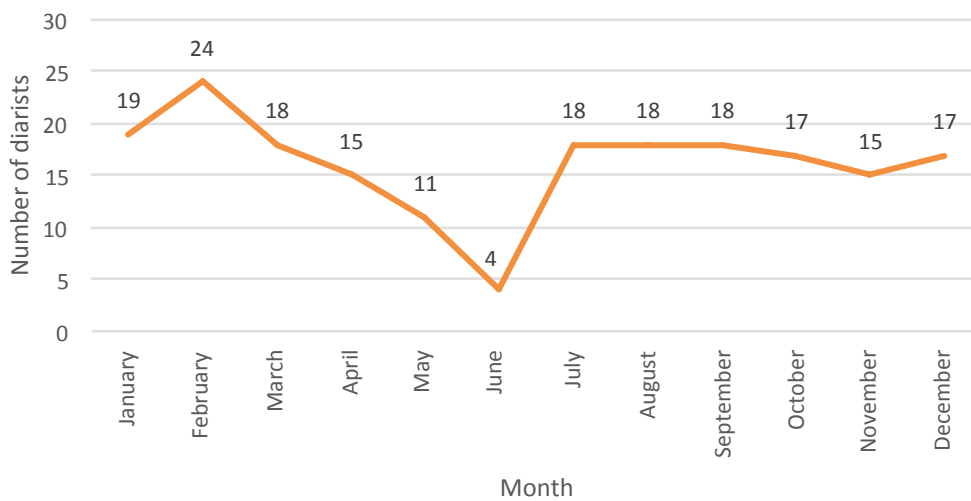
Figure 10 Number of days spent in WA



Source: Online user-generated travel diaries.

The March quarter was more popular than other seasons, findings which are consistent with TRA data analysis results. The June quarter (from April to June) is the least popular season for diarists, with June in particular being an unpopular month.

Figure 11 Month of visitation to WA by Chinese travellers



Source: Online user-generated travel diaries.

Comments related to specific destinations

Figure 12 illustrates popular destinations in WA, with the size of the words indicating how many times they were mentioned in the trip diaries. Perth was naturally the most popular destination, followed by Margaret River, Rottnest Island, Fremantle, Kalbarri, Albany, Busselton, Cervantes, Nambung and Geraldton. Comments about specific destinations can be summarised as:

- Perth and Rottnest Island most impressed Chinese visitors according to the number of comments made about these places. Black swans, sunsets over the ocean and sunrises over the escarpment were also noted with pleasure.
- Diarists loved the view of the sea from Rottnest Island. The ferry ride to and from the Island was smooth and easily managed, and the ocean was pristine. The Rottnest Island quokkas were considered charming.
- Some visitors considered personal security could be a problem in certain parts of Perth at night.
- Most visitors felt the road signs in Perth were clear and easy to understand.
- In Margaret River, visitors bought wine and food products as gifts and souvenirs.
- While in Guilderton, one group had an enjoyable day out, but the wind was unexpectedly strong and cold, which they hadn't been prepared for.
- Albany was considered a wonderful place to go swimming, boating and fishing. The wild flowers around Lancelin, wineries in Margaret River, the Pink Lake in Kalbarri, the beach in Busselton, the prison tour in Fremantle and the Pinnacles unique landscape in Nambung were all listed and positively commented upon.
- However, many complained about the poor mobile phone coverage during their trip, especially in the Wheatbelt.



Analysis

of WA Chinese visitors: The Perth
International Airport Intercept and
Online survey data

Analysis of WA Chinese visitors: The Perth International Airport Intercept and Online survey data

While this report analysed online travel diaries of Chinese visitors to WA (see earlier), the Perth International Airport intercept survey (PAIO) was an opportunity to talk to Chinese visitors about the ways they made their trip decisions, and to reveal their fresh, recent experiences of Western Australia in particular and Australia in general. The survey added a further dimension to this report that the travel diaries may not have revealed due to personal, privacy or security reasons.

This section discusses the findings of the PAIO survey, including:

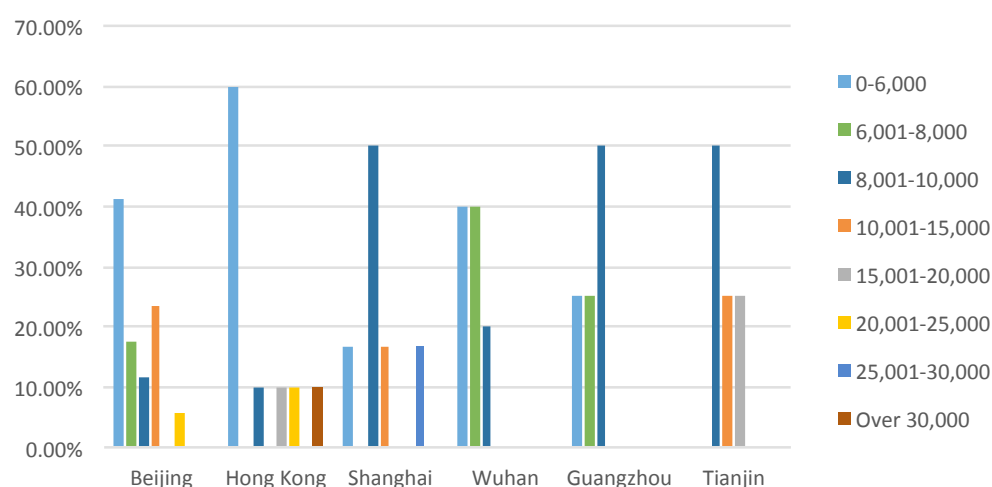
- A profile of PAIO respondents
- How they sourced information about their travel plans
- The purpose of their visit
- Satisfaction ratings for various attractions and features
- Observations of tour groups in action, and
- Suggestions from PAIO respondents about how their trip could have been better.

WA's Chinese visitors' profile from the Perth Airport intercept (PAIO) survey

- **Age:** 78 per cent of Chinese visitors were aged between 18 to 45 years, and of that, 37 per cent were between 25 to 34 years. The 25 to 34 year age group, due to their status as the single-child generation, are usually the focus of the family unit, with more freedom and financial support from their family to travel abroad (Tsang, 2015) and potential to buy luxury brands (Degen, 2009).
- **Gender:** 59 per cent were female and 41 per cent male.
- **Income:** 52 per cent reported that their average monthly income was ¥0 to ¥6000 (\$0-\$1,200).
- **Monthly income by city of origin (top 5 cities):** Among the top 5 cities (see Figure 13), all are Tier 1 cities (megacities by population and GDP; see Glossary), and only Wuhan is a Tier 2 city.
 - o For Shanghai, Guangzhou and Tianjin, approximately 50 per cent of respondents have a monthly income between ¥8000 and ¥10,000 (\$1,500 and \$2,000).
 - o For Wuhan, approximately 80 per cent of respondents have a monthly income up to ¥8000 (\$1,500).
 - o Respondents from Hong Kong have a wider range of income levels, with most in the ¥0 to ¥6000 (\$0-\$1,200) range, but peaking at over ¥30,000 (\$6,000).
 - o Of the Beijing visitors, 40 per cent have monthly incomes less than ¥6000 (\$1,200), and 95 per cent less than ¥15,000 (\$3,000).
- **Group size:** 26 per cent of Chinese visitors were couples (married, de facto or living together), 18 per cent were single (never married, divorced, separated or widowed) and 28 per cent were family or friends with 3 or 4 people in a group.

It is interesting to note that WA attracted middle-class visitors from Shanghai, Tianjing and Guangzhou, and relatively lower-income visitors from Beijing, Wuhan and Hong Kong. An opportunity therefore exists to target high-value visitors from Shanghai, Tianjing, Guangzhou, Beijing and Hong Kong.

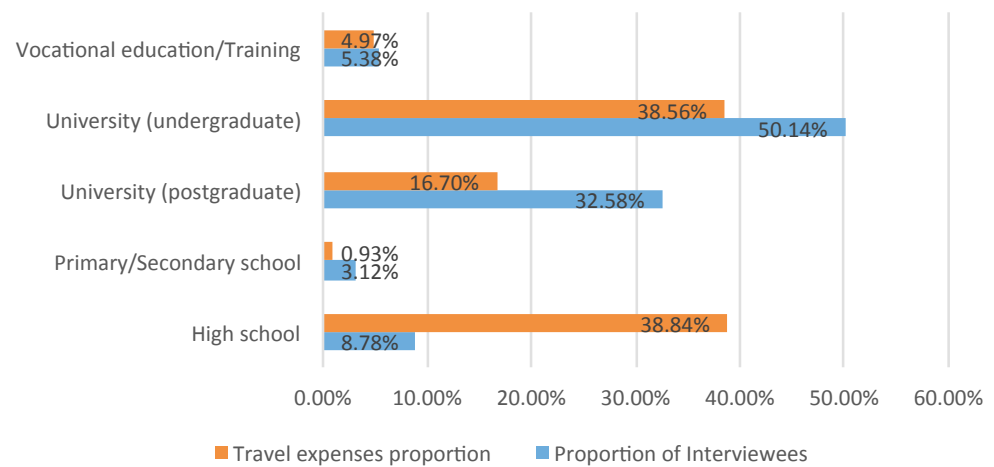
Figure 13 Monthly income (¥) by top 5 cities of origin



Source: Perth International Airport intercept and online survey 2017.

Figure 14 illustrates the level of education for interviewees, and what proportion of total travel expenses for each education level. Most of the PAIO respondents have an undergraduate or postgraduate education. Interestingly, the respondents with a high school education only account for 8.8 per cent of the total proportion of interviewees, but they contribute the highest proportion of total expenses (38.8%). This is followed by the respondents with undergraduate degree (50.1%) who contribute to 38.6 per cent of total expenses.

Figure 14 Proportion of total visitors and travel expense, by level of education



Source: Perth International Airport intercept and online survey 2017.

Table 6 Top 7 first and last ports of call in Australia

Top 7 first port of call	Percentage	Top 7 last port of call	Percentage
Perth	88.15%	Perth	76.56%
Melbourne	4.05%	Sydney	6.51%
Sydney	4.05%	Melbourne	4.17%
Brisbane	1.73%	Brisbane	2.08%
Adelaide	0.58%	Adelaide	0.52%
Canberra	0.58%	Gold Coast	0.52%
Tasmania	0.58%	Canberra	0.26%

Source: TRA IVS data

Approximately 88.2 per cent of the PAIO respondents chose Perth as their first port of call and 76.6 per cent as their last port of call during their visit to Australia (Table 6). Perth is on the same time zone as all of China, meaning the effects of jet lag are lessened, and making personal and business communication much more convenient. Many of our respondents were unaware of this fact before their visit, so an opportunity exists to promote this location advantage.

Table 7 lists the top 10 cities of origin (home city) and departure (last port of call before Perth). The highest percentage of respondents originated from Beijing (10.2%), while only 7.4 per cent of them departed from Beijing before arriving in Perth. Over 26 per cent departed from Guangzhou, but this was the origin for only 4.8 per cent of respondents, indicating this city is the major transportation hub in mainland China, which is no surprise given the existing direct flight route between the city and Perth. Hong Kong has a smaller percentage difference between origin and return destination cities, showing it as a transportation hub and a source of visitors.

Table 7 Top 10 origin and departure cities

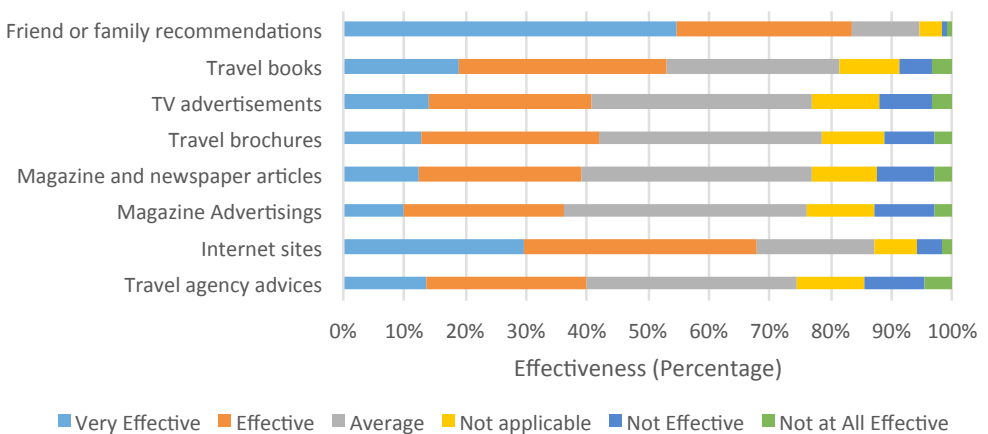
Top 10 origin cities	Percentage	Top 10 departure cities	Percentage
Beijing	10.17%	Guangzhou	26.01%
Hong Kong	5.93%	Hong Kong	8.05%
Guangzhou	4.80%	Beijing	7.43%
Shanghai	4.52%	Singapore	3.72%
Shenzhen	2.54%	Shanghai	3.41%
Wuhan	2.26%	Melbourne	3.10%
Nanjing	1.98%	Nanjing	1.86%
Changsha	1.69%	Shenzhen	1.86%

Source: Tourism Council WA 2014 'Experience Perth' tourism region; Australian Bureau of Statistics.

Travel information sources

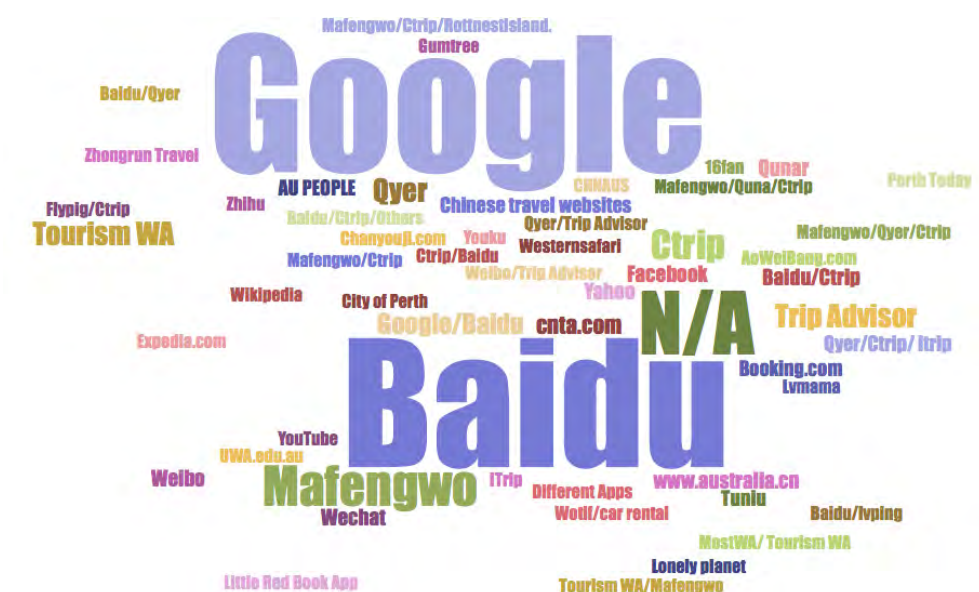
The intercept survey showed that recommendations from friends and family heavily influenced trip decisions, followed by information gathered from internet sites and travel books. Five other information sources with similar effectiveness ratings of 40 per cent or higher are illustrated in Figure 15. The most popular websites used by these respondents are illustrated in Figure 16, the size of the text reflecting the most used. Google, Baidu, Mafengwo, Ctrip, Tourism WA, Trip Advisor and Wechat were the most popular. In addition, the respondents indicated that they may at times combine different sources to cross-check trip information, such as Baidu/Ctrip and Tourism WA/Mafengwo.

Figure 15 Effectiveness of information source



Source: Perth International Airport intercept and online survey 2017.

Figure 16 Popular websites used by Chinese visitors



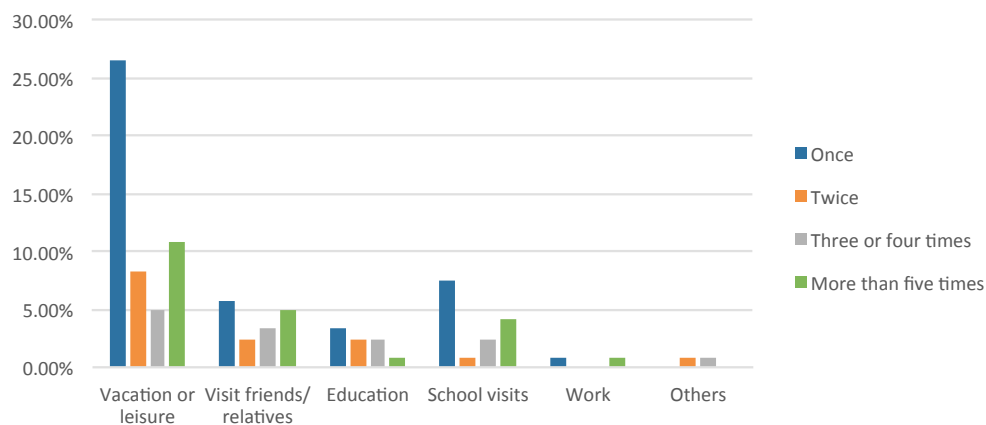
Source: Perth International Airport intercept and online survey 2017

Purpose of visit: The PAIO Survey

This survey discovered that most respondents had previously visited Perth. While approximately 43.8 per cent were visiting WA for the first time, for 14.9 per cent it was their second time. 15 per cent of respondents were visiting WA for their third or fourth time, and 21.5 per cent had been here more than four times.

Some 50.4 per cent came for holiday and leisure, 16.5 per cent for study or education and 11 per cent to visit friends and family. For first-time visitors and the most-travelled (5 or more visits), the purpose of their visits fell primarily into these three categories (Figure 17).

Figure 17 Number of times travelled to WA by purpose of visit

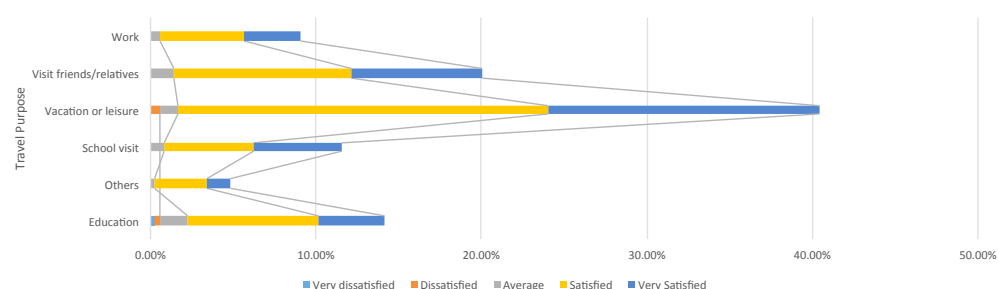


Source: Perth International Airport intercept and online survey 2017.

Trip satisfaction

In general, most respondents rated they were 'very satisfied' or 'satisfied' with their WA trip experience. Respondents coming for education purposes or to visit friends/relatives trip purposes rated their travel experience lower than holiday respondents (Figure 18).

Figure 18 Satisfaction level by trip purpose



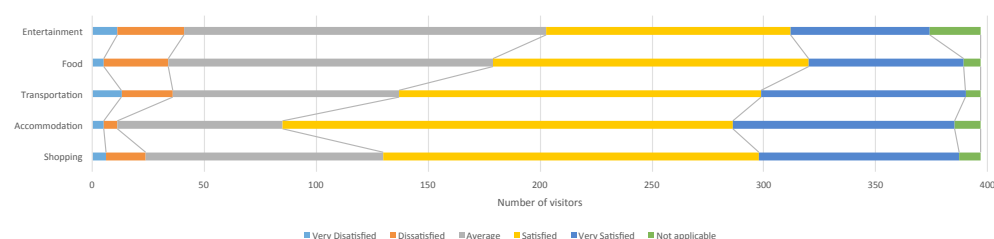
Source: Perth International Airport intercept and online survey 2017

In terms of general entertainment, visitors were less satisfied. Almost 50 per cent stated that their trip experience was 'average' or 'below' (Figure 19). Some respondents complained of the lack of information on local entertainment and recommended that entertainment and event information be updated more frequently on Chinese social media, such as WeChat.

Similarly, 45 per cent of respondents rated the food and beverage experience as 'average' or below. Several factors may contribute to these ratings: lack of local restaurant information in Chinese, face-to-face language barriers, cultural differences and a general difficulty in locating good restaurants and cafés in the regional areas.

A considerable number of respondents indicated that public transport was often inconvenient to use (long delays between services, no multilingual signs) and that shops closed too early. However, the PAIO respondents were mostly satisfied with the accommodation. Approximately, 20 per cent of those surveyed rated WA accommodation as 'average' or below.

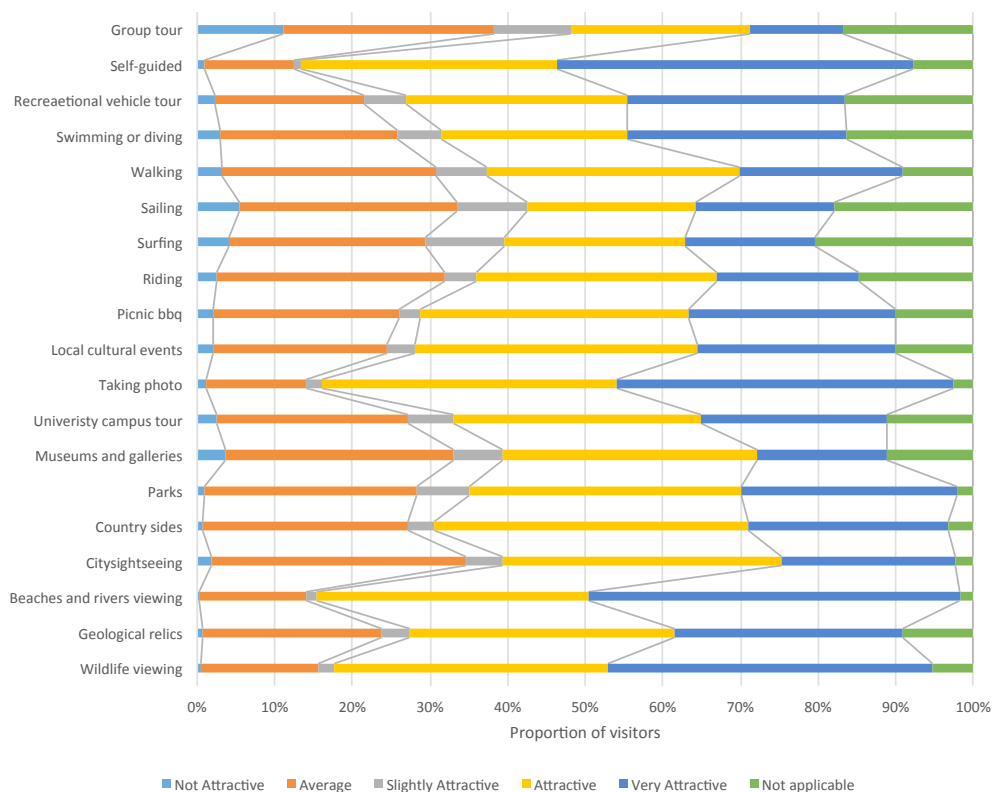
Figure 19 Satisfaction level by facility



Source: Perth International Airport intercept and online survey 2017

Figure 20 shows the level of satisfaction for the most common activities undertaken by Chinese visitors in Perth. The most popular were taking photos, visits to the beach or river, and self-guided trips, while the least popular were group tours, sailing and surfing.

Figure 20 Satisfaction level by activity

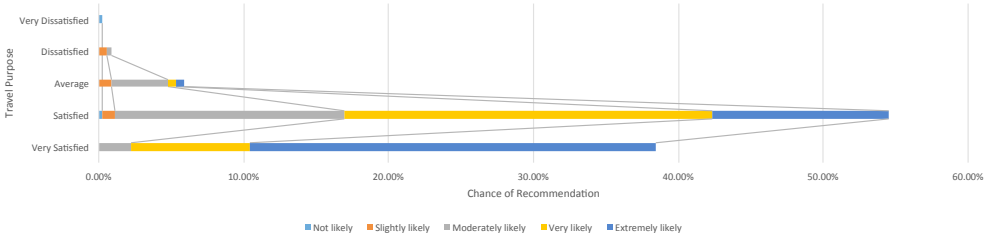


Source: Perth International Airport intercept and online survey 2017

A higher satisfaction rate suggests a visitor is more likely to recommend others to come to WA. While this study supports this assumption, some variations were noted.

Figure 21 shows that only 17 per cent of the total PAIO respondents who rated their trips as 'satisfied' would be 'moderately likely', 'slightly likely' or 'not likely' to recommend WA to others. Of the total participants, 36.2 per cent of those who were 'very satisfied' with their trip were 'very likely' or 'extremely likely' to recommend WA. When the respondents rated their trips as 'average' or below, very few were likely to recommend WA to others. More research is needed into the reasons why some respondents, while satisfied with their trips, might not recommend WA to other potential visitors.

Figure 21 Chance of recommending WA to others by level of satisfaction



Source: Perth International Airport intercept and online survey 2017

WA's PAIO Chinese visitors' travel patterns

In this section, we summarise the ratings by the respondents: the popular routes, attractions, average duration of visit to each attraction and the general satisfaction with each attraction.

Popular attractions in WA

The survey revealed that the most popular attractions were:

- Perth city: Kings Park, the Swan River, Northbridge, Fremantle and Rottnest Island.
- North and east of the city: The Pinnacles, Hutt Lagoon and Pink Lake, the Swan Valley and the Caversham wildlife park.
- South West region: Busselton Jetty, Wave Rock, Margaret River Wineries, Valley of the Giants and The Gap.

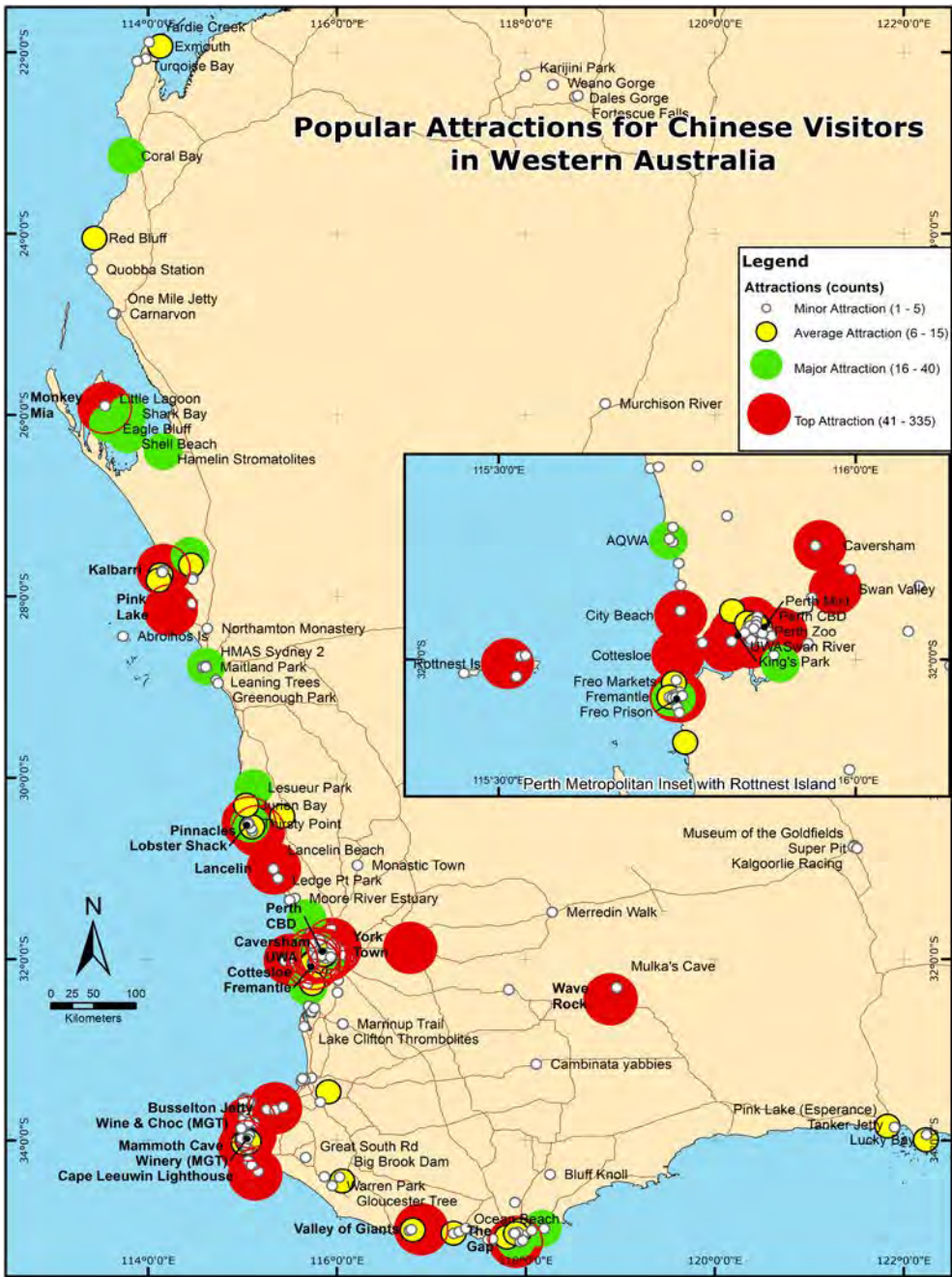
Though Figure 22 indicates, thematically, the popularity of the attractions themselves, Figure 23 gives an important spatial dimension to assist in the recommendations that report offers later.

Figure 22 Popular attractions in WA



Source: Perth International Airport intercept and online survey 2017

Figure 23 Spatial pattern of popular attractions in WA

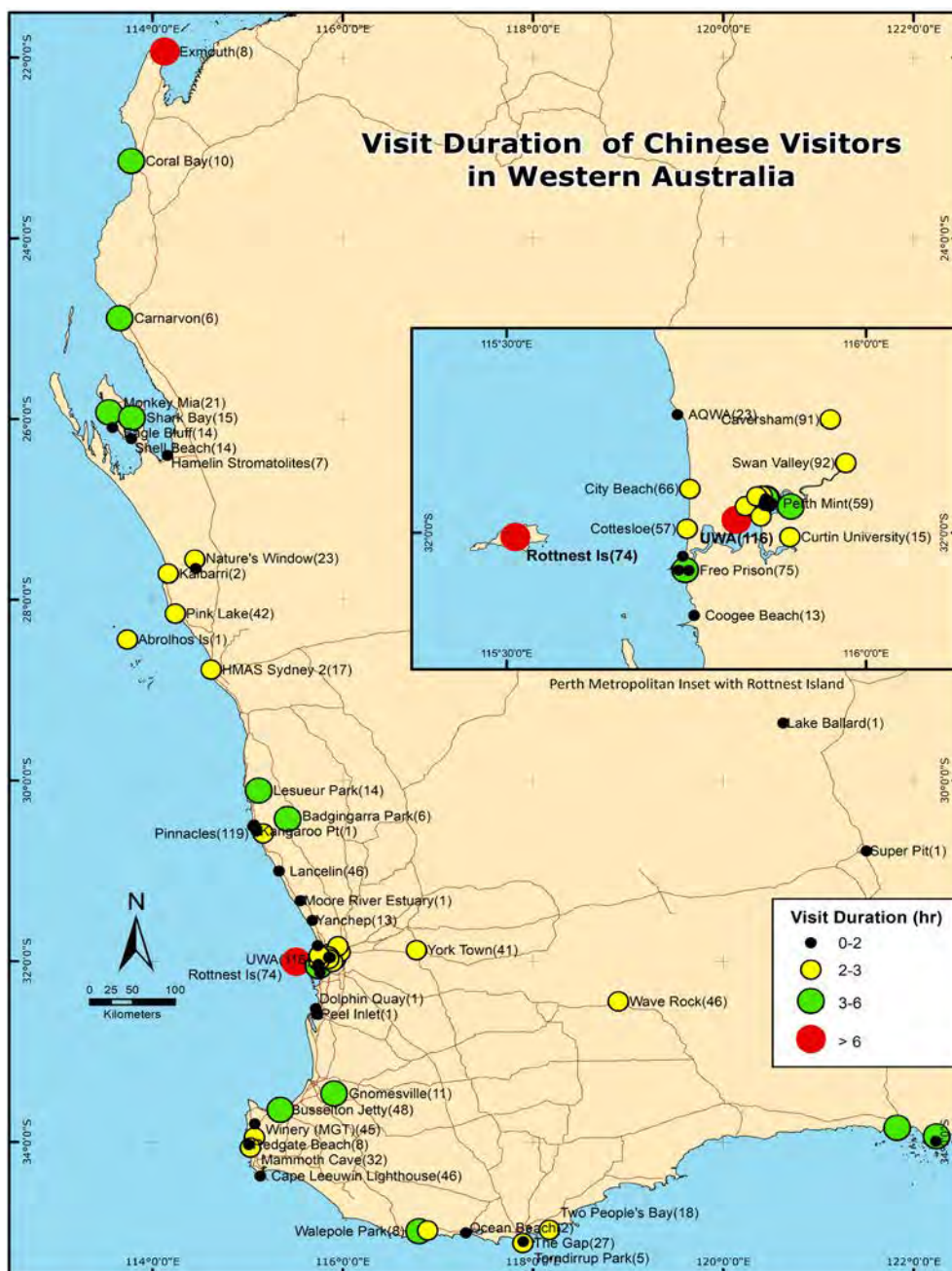


Source: Perth International Airport intercept and online survey 2017.

Visit duration

The time spent at different attractions depends on many factors, including the number of things to do and see, general attractiveness and distance to other attractions. Figure 24 shows, for example, that Rottnest Island and Exmouth had visit durations greater than 6 hours (red circles), while most regional attractions had visits lasting less than 6 hours (green, yellow and black circles).

Figure 24 Visit duration of popular attractions in WA

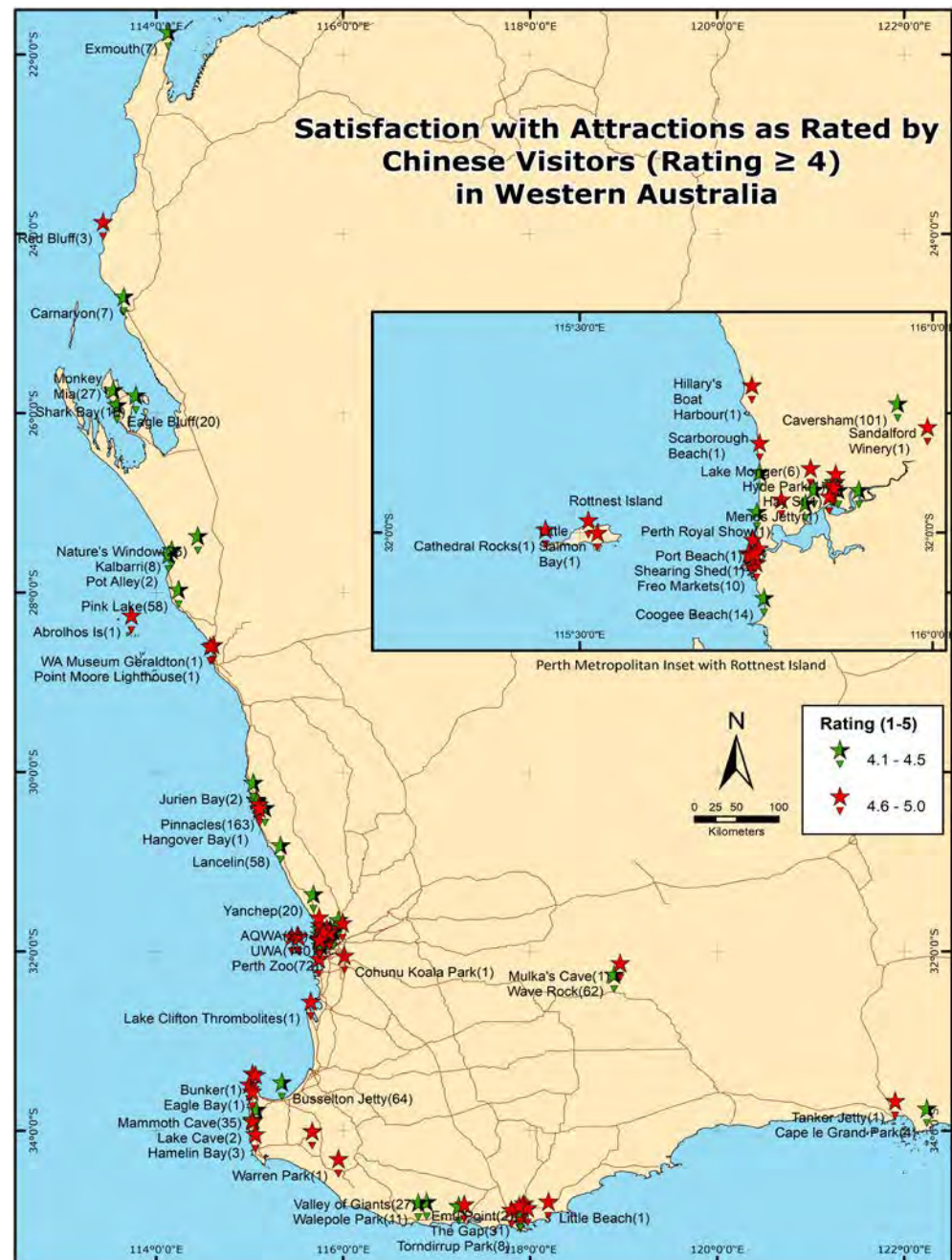


Source: Perth International Airport intercept and online survey 2017.

Satisfaction ratings by Chinese visitors in WA

Figure 25 and Figure 26 show the satisfaction ratings by the respondents and also the number of respondents who rated the attractions (in brackets). PAIO respondents visited 281 attractions and rated 145 of these, with 87 attractions rated over 4 stars.

Figure 25 Satisfaction with attractions by Chinese visitors in WA (rating ≥ 4)



Source: Authors' own calculations from the PAIO survey.

Figure 26 Satisfaction with attractions by Chinese visitors in WA (rating ≥ 1 and ≤ 4)



Popular trip itineraries for Chinese visitors

The respondents typically travelled in patterns and with set itineraries which can be mapped.

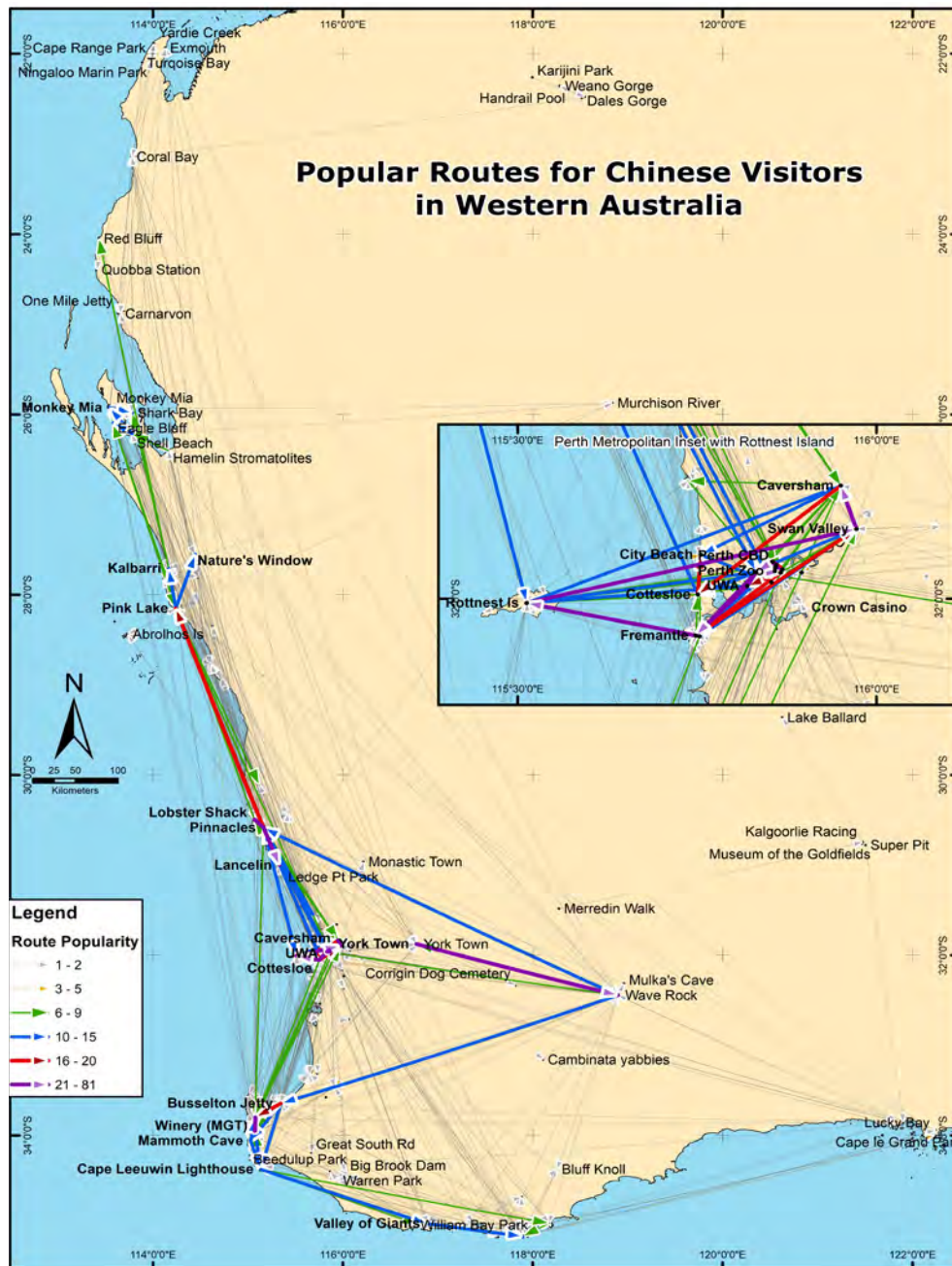
Figure 27 shows the most popular routes for all modes of transport.

A distinct triangle of popularity is noticeable with the Perth region at the centre and the points extending out to the Pinnacles, Busselton Jetty and Wave Rock. Other popular route combinations were:

1. Busselton Jetty, Margaret River Region and wineries, Mammoth Cave and Leeuwin Lighthouse;
2. Leeuwin Lighthouse, Valley of Giants, The Gap and Nature Bridge and the Walpole-Nornalup National Park;
3. Perth, Lancelin Sand Dunes, Lobster Shack and the Pinnacles;
4. Pinnacles, Pink Lake, Kalbarri National Park and Nature's Window, and Monkey Mia;
5. Pink Lake, Monkey Mia and Carnarvon; and
6. Carnarvon, Coral Bay and Exmouth.

Some visitors went as far as Karijini National Park, the Murchison River, Kalgoorlie and Esperance.

Figure 27 Popular routes in WA



Source: Authors' own calculations from the PAIO survey.

Suggestions and observations by respondents

Chinese visitors to WA are typically younger than those visiting other states, and are more likely to be well-travelled compared to first-time travellers who prefer to go to eastern states initially. The tourism packages drawing visitors to WA reflects this demographic:

- Outdoor activities such as fishing and camping trips, hiking trips, wildflower tours, bird and whale watching, and golf packages.
- Adventure activities such as climbing/abseiling, bungee jumping, white water canoeing/rafting, horse riding, and flying.
- Cultural pursuits such as art and music, food and wine, self-education, and aboriginal culture tours.
- Self-guided driving tours.

While many Chinese visitors to WA are relatively wealthy, often coming here to visit friends, family, or colleagues, international tourism is still a luxury product, meaning affordability and value for money are key motivators. Therefore, travelling long distances between attractions was a concern for some groups trying to make the most of their available time. For example, the Pink Lake in Geraldton was well known to many visitors, but the significant travel time had to be balanced against other activities.

A number of respondents noted how early shops closed in the city and at local shopping centres so that after returning from a day's outing there was no opportunity to use the valuable free time in the early evening. Retail trading to 6:30pm every day and longer trading hours on Sundays were suggested by many.

In general, shopping in Perth was considered to be more expensive than in other states. Brand outlets such as Watertown were familiar to many visitors, but the variety of stores was limited, and few seemed to cater adequately for group visits (The many vacant stores at Watertown was noted on a number of occasions).

Some tour operators offer shopping experiences as part of their packages and often reduce their upfront prices, relying on retail commissions instead. Our respondents said this happened less in WA compared to other states. However, some form of low-pressure, guided shopping experiences could be a way of helping visitors make the most of their time.

Accommodation prices have dropped gradually following the mining downturn. It is now much easier to book accommodation in regional areas for inbound tour groups. These prices are similar to those in other states.

Food

A typical Chinese diet contains a large proportion of rice and noodles, stir-fried vegetables, and simply-prepared meats, so Western food can be relatively rich in comparison. While most visitors are happy to try new food experiences, they would equally welcome at least one familiar, home-style meal each day. Many tourists noted there was a lack of Asian food choices at regional visitor attractions, even when it was known an Asian tour group was arriving.

A number of respondents said that Perth living expenses in general, and food prices in particular, were relatively higher than those on other states. Meal-delivery services, such as Deliveroo and Uber Eats, were expensive and involved long waits.

Some tour operators have suggested that authentic or premium local food, wine and multicultural food need to be promoted more, for example through a regular multicultural food night market in Northbridge.

Infrastructure and services

Multilingual signs are taken for granted in China, but in Perth there are almost none outside the tourist precincts and in places where they are most needed such as airports, public transport and at attractions. Multilingual digital devices at museums, art galleries were found to be lacking.

Equally, free public WIFI is assumed, but is often not available, even at some hotels. For a largely family-oriented society it is important for visitors to stay in touch with friends and family in China and to share their trip in the moment, but this is not always possible. And yet, timely posting of travel diaries and photos or videos of WA on social media are valuable advertising for the State.

Many visitors experienced poor mobile phone signal outside the metropolitan area. Beyond the obvious frustration and inconvenience, some felt this left them vulnerable in possible emergency situations. Incorporating emergency procedures and contact numbers into visitor brochures would help allay some of these concerns.

Water fountains, and clean and safe public toilets were reportedly also hard to find.

Transport

Discount airfares and a common time-zone makes WA an obvious destination for Chinese visitors. But, these consumers are extremely price-sensitive, so small movements in airfares can have an immediate effect on buying decisions.

Chinese visitors, in general, are happy to use public transport, but in Perth some common problems were encountered:

- Using public transport took much longer to get between destinations than alternatives such as driving, particularly on weekends.
- The CAT buses provided a good service but stopped too early in evening. Extending the service in line with restaurant closing hours (say, 9:00pm or 10:00pm) would be beneficial.
- The SmartRider card purchase fee and remaining card balance are non-refundable when users return home.
- Signage at many bus and train stations didn't provide multilingual alternatives.
- A number of respondents suggested creating a social media channel that would allow Chinese visitors to access trip pooling or car and bicycle pooling.
- Public transport in regional areas was almost non-existent.

However, bus drivers in particular were found to be friendly and helpful.

Interviews and observations of tour groups in action

In interviews with tour guides and observations of tour groups in action, most guides knew that they had to be well informed and engaging, vital characteristics in keeping their visitors happy on their trip and keen to recommend WA to future tourists when they return home. Yet the job is difficult. It was commonly expressed that the long distances and many hours driving, three or four times per week, caused some degree of stress and fatigue.

The interviews revealed a unique combination of characteristics of the tour guide including:

- Patience and approachability, yet keeping the group to a tight schedule;
- The need to understand the clients' needs even when those clients may come from a different cultural milieu and may have limited English;
- The need to maintain up-to-date knowledge of the history and features of the places they are passing through and visiting;
- A range of practical skills from first aid, navigation and negotiation to the ability to tell a good yarn.

The long hours away from home and on the road make tour guides not dissimilar to long-distance truck drivers, an occupation that requires a certain temperament and family support network. Both occupations can also suffer from negative consequences such as poor diet and the use of legal and illegal stimulants to stay alert and on schedule. There are currently no specific guidelines covering tour guide working conditions.

WA tour guides are better paid than their counterparts in other states, earning between \$200 to \$300 per day, with most working part-time or as a second job.



Are we China ready?

The South West case study

Are we China ready?

The South West case study

This section reports on a number of workshops and presentations the authors held aimed at understanding Chinese visitors coming to Western Australia and what issues industry stakeholders need to address. In the underlying research question 'what kinds of visitor products can be developed and promoted for the Chinese market in terms of the Western Australian market?', a visitor or the tourism product is considered to be not only the physical geographical attributes of a place, but the whole human, tourist experience (Saarinen, Rogerson & Hall, 2017).

This section identifies and summarises the issues highlighted by the industry stakeholders, and then makes recommendations based on the findings.

Findings of the South West knowledge-sharing workshops and surveys

Profile of the respondents and their industries

The respondents were a broad range of members from the Bunbury Chamber of Commerce and Industry (BCCI). Their tourism industry role composition included owners (44%), managers (28%), and employees (28%). Tourism and hospitality experience was well represented with 69 per cent of respondents having a minimum of five years' experience: 40 per cent had between 2 and 17 years' experience, a further 40% had 10 to 20 years' experience and 20 per cent reported 25 years' experience in the field.

The industries represented included tourism, hospitality, accommodation, wineries, galleries, food, arts and culture, visitor information centres, local government, weddings and events, and farm-stays. Each organisation had a medium to large turnover¹. Their companies and organisations cater to a variety of tourists other than Chinese visitors including Western Australians (55.7%), interstate Australians (47.5%), and other foreign tourists (27.5%).

Are we China ready?

We're not, but we want to be!

This comment characterised the general sentiment in the workshop discussions:

A local government representative believed the Bunbury region's organisations and local businesses were not 'China ready'. For example, many businesses in the food service and hospitality areas did not have Chinese-speaking staff and only two participants could 'tick all the boxes' for being China, ICT, web and tourist ready. These latter two participants, vastly different tourism industry stakeholders - one a small private business, the other a local government coastal organisation - understood tourism's complexities, the importance of ICT, foreign languages, Chinese tourist needs and the associated challenges of a new tourist cohort. The following summarises the current issues and barriers that the participants identified in relation to Chinese 'tourist ready'.

Asian exposure, education, language and experience

- 78 per cent of the participants did not have Asian language training or skills. Only three individuals had Mandarin language education: two as beginners and one conversational. Two individuals had Indonesian language fluency and conversational Vietnamese.
- 44 per cent had no training or experience in the Asian market.
- Of the 11 per cent who had any Asian market training and experience, 22 per cent had both training and experience while 28 per cent had only experience.
- 50 per cent had a formal qualification: Tourism and hospitality management, food and beverage, business and management, project management, viticulture, arts and culture, communications.
- 97 per cent of the respondents had visited Asian countries (mostly China, Malaysia, Thailand and Japan) as tourists.

Stakeholders' knowledge of Chinese tourists' needs, Chinese business training and networks are inconsistent.

South West tourism and hospitality providers are educated and experienced, but do not have Asian language skills.

¹ We use the Australian Tax Office's definition of a large-turnover business as one with an income over \$250 million per annum, ATO 2017.

Professional level ICT skills, online advertising and marketing, websites and well translated web pages have yet to be developed.

We want Chinese tourists! We want to know more about them and we want more training, transport and infrastructure.

- None of the participants had any experience of Asian industry familiarisation (famils). These inexpensive trips to tourist destinations are offered to outbound industry role-players, such as tour operators or travel agents (sellers) to assess tourism products. Famils are effective ways to not only promote tourism, but also provide tourism providers a better understanding of the host culture's inner workings of its hospitality provision and local tourists' expectations (who in turn may visit Australia). This survey finding indicated that the survey participants did not have operator or travel agency sales experience to contribute to their current industry experience.

ICT competency

The tourism sector in China and Australia, depends heavily on information technology in general, both for tourists planning and researching their trips, and for industry players trying to analyse and predict the behaviour of tourists through, for example, social network analysis. In terms of information and communications technology (ICT), the survey findings demonstrated that:

- 83 per cent of respondents rated 'high' and 'medium' competency for their business provision of ICT, digital tools and internet connection.
- Yet 22 per cent of employers considered that their staff ICT competency was below the employer's own standard or that of the industry in which they are involved.
- The government respondents rated their own and their fellow staff competency as 'low'.

Future research and understanding Chinese visitors

Over 70 per cent of the BCCI respondents wanted to participate in and see future tourism research initiatives to better understand Chinese tourists. This is not surprising as 15 respondents had between 10 and 500 Chinese customers in the 12 months prior to December 2017. It is estimated that the region may have had between 1,000 and 5,000 Chinese visitors (City of Bunbury and The Truffle and Wine Co. respectively). Another respondent averaged 30 room nights per month.

Specific nation tourism, China and tourism boom awareness

There was a cohort of small operators and semi-retirees who clearly indicated they were uncomfortable with Chinese tourists, particularly their brash behaviour and demanding expectations.

Some comments from small operators, farm-stay, visitor's centre representatives, and 'new to the industry' tourism and hospitality business owners include:

I do not want to subscribe to a 'China Ready' programme.

Train tourists to also respect local culture, e.g. being quieter in public places.

Chinese tourists need [to understand] Australian behaviour expectations.

My experience with two separate groups in campervans was very pushy behaviour. We were not open but [the tourists] would not take no for an answer.

With such comments in mind, we asked the question: *Do you know of the Japanese tourist boom of the late-1980s to mid-1990s?*

This was a boom period for Japanese tourism and it heralded a new era in Australian tourism. This also translated into more international buyers of real estate, mostly in Queensland and to a lesser extent in Melbourne and Sydney. Commensurate with Japan's economic decline, and later SARS and terrorism, there was also a resulting decline in international interest in tourism, hospitality, resorts and real estate. This was particularly difficult for smaller tourism providers who had focused on single-culture tourism (Backer and King, 2015). Meanwhile, the Japanese tourist market matured, from those seeking only Japanese tourism products to wanting authentic Australian experiences, and travel styles changed from large busloads to small groups, couples and individuals (Backer and King, 2015).

Fifty per cent of the participants acknowledged the boom and two comments were added:

Wildflowers were a major drawcard and [so were] direct flights

Effective use of social media is needed to get the word out to Chinese single culture tourists (with reference to a lack of information of the previous Japanese tourism boom).

In terms of the current Chinese tourism boom, most tourists are currently visiting eastern Australia (Tourism Research Australia, 2017), however 64 per cent of workshop respondents considered Chinese tourism as a long-term growth prospect. Although, one government representative believed the China boom would not be a long-term market for South West operators.

Some comments were broader and considered other factors:

How could it not be [a long-term growth prospect]? The market is still developing, from a low base, and yet to become more sophisticated with emerging markets, already in travel, investment, education, and in the same time zone.

Others were more tentative remarking "[Chinese visitors] are here in WA but [WA] does not have a known attraction".

And a more pragmatic comment was that "it will take 10 to 20 years to increase Chinese tourism in WA!".

Chinese tourism is a long-term growth prospect, but there is some apprehension.

Why is the South West not China Ready?

The preparedness to be China-Ready® for some respondents, is commensurate with their perception of the need to be so, and the acceptance of the general industry mechanisms already in place. Only a few adhered to the old adage, 'if it ain't broke, don't fix it', approach to business change and that included being tourist ready, as well as, China ready.

Nonetheless, those who were most willing to embrace change and improvement across all areas of tourism, argued the lack of industry collaboration and understanding of other businesses' needs and profits progression. This was observed between the winery stakeholders as well as between owners and representatives of the small and large businesses. Professional tourism business practices were challenged by conservative approaches, or by a fixed, singular and self-interest focus.

Labour challenges: Chinese speaking staff, translation costs, and access to interpreters.

Chinese speaking staff

All those interviewed and surveyed thought providing Chinese-speaking staff would be problematic and costly.

Employing Chinese-speaking staff to target the Chinese market was not a consideration for 83 per cent of respondents with one respondent clarifying that "visitor numbers were not yet sufficient to warrant this".

Some 33 per cent of the participants responded simply with "no" to employing Chinese-speaking staff, while others elaborated:

It has been difficult to keep up with the demands of so many different visitors. It's not a focus. We will consider it in the future.

The cost is too much and there are no Chinese speakers applying for employment.

However, if they did employ Chinese-speaking staff, one respondent said the staff member would "have to prove their worth in every aspect, not just their ability to deal with Chinese visitors".

Interestingly, the Visitor Information Centre respondent noted the Centre did not have Chinese visitors, no Chinese staff were employed, nor did they have any foreign language speakers. Training for the Chinese market reflected similar figures to Asian training in general (see profiles above)

- 82 per cent of the participants acknowledged that they did not have specific training for Chinese tourism.
- 9 per cent had some form of training.
- One respondent had participated in the China Ready® Program.

Furthermore, the use of foreign or Chinese language web and translation sites for advertising, marketing and communications was commensurate with the low ICT competency (see earlier), where,

- 83 per cent did not use Google Translate.
- 89 per cent did not have a website link that included foreign language dedicated pages.
- The Bunbury – Jiaxing Business Development Office (BJBO) was called upon only once or twice a year for interpreting by one survey respondent.

Over 55 per cent of the participants did not have, or had not responded to, a China Ready® action checklist. Neither of the local government organisations had a China Ready® checklist, even though one had developed the Chinese Investment Prospectus for the Bunbury region.

Chinese tourism business networks

In terms of having developed any business partnerships with Chinese tour operators or agencies within Australia:

- The local government organisations were unsure.
- 44 per cent had not developed any partnerships.
- 17 per cent had Australian-based connections, one of which was located in Perth and others located elsewhere (no names disclosed) in Australia.

Overall, only one tourism provider at the workshop had a Chinese language webpage, and also had business networks with China-based inbound tour operators and agents.

Being accredited as China Ready is not a pragmatic choice for some operators, nor is it necessary for everyone.

Being tourist ready includes being Chinese tourist ready

In contrast to the perceived culture pressures of large numbers of tourists, responses from larger or more 'seasoned' tourism operators shared pragmatic, yet hospitable opinions. These questions were led by the data obtained from our surveys and interviews of Chinese tourists.

We asked participants, if they consider Chinese visitors as tourists or guests. 33 per cent of respondents considered Chinese visitors as tourists, and 50 per cent as guests. Three participants did not respond. Comments included:

[We] make them feel welcome. [They are] guests in my region and [we] treat our customers as friends.

They are both visitors and tourists, but I always hope to turn them into ambassadors for our regions.

[They are] tourists. I feel that Chinese tourists spend very brief periods to get a lot [seen] in a short time [whereas guests linger for longer periods of time].

Tourists should always be treated as guests, [though] service levels are still poor in WA.

We also asked whether respondents agreed that tourism is a form of hospitality. 78 per cent agreed with this statement, and 11 per cent disagreed. Two did not respond.

When asked what kinds of tourism business and products do Chinese tourists desire, respondents commented:

The natural attractions of the landscape, its wide-open spaces, wildlife, beaches, the 'clean and green'.

Australian, high quality local produce, food and wine.

Scenic tours, ecotourism, not wine tours. Interaction with locals on their premises, experiences, farm stays, malls, things they can find in their own backyard.

Souvenirs, swimming with dolphins, shopping malls.

Self-cooking BBQs.

Travellers in any new country will likely experience some degree of culture shock, be that problems with food or language or knowing the correct societal norms. Empathic and understanding hosts can help ease this discomfort. Amongst our respondents, understanding of the issue was varied. When asked the question 'have you noticed culture shock in your Chinese guests?', respondents commented:

[Problems with] food, isolation, language, cultural differences, out of the city they are afraid of empty roads, the darkness [and] little lighting evoked tourist discomfort.

Three respondents understood what it was like to experience culture shock in China, while others were less empathetic:

[They enjoy the] welcoming, and the handling of money.

Others did not notice any culture shock at all.

Recommendations from stakeholders and the research

The recommendations were clear from the stakeholders: they want more research into understanding the Chinese tourist market and they are enthusiastic about being involved in this research. A number of major, specific issues were identified.

Labour Pool

The costs of employing Chinese-speaking staff need to be considered, but there are risks of Chinese-speaking staff exploiting tourism employers due to a dependency on the hiring of specialised staff. This is not dissimilar to hiring chefs in remote regions, where the employer can be at the behest of such specialised staff.

It may also be difficult to attract Chinese-speaking staff to regional and remote areas, pushing up the costs accordingly.

This could also bring about a lack of employment opportunities for local-based, enterprising, but non-Chinese, speaking staff. For example, department stores in Perth are now employing Chinese staff and some luxury brands only use Chinese staff.

The services of the Bunbury-Jiaxian Business Office (BJBO) had been used for a few projects such as translation, a website presentation and market research, but a representative indicated the service was underutilised.

Recommendations: satellite business offices to be established in the main regional centres, where interpreting skills can be utilised for larger tour groups and recruited and dispersed accordingly to peak seasons.

ICT Competency

This is a major concern for South West regional tourism stakeholders. The respondents represented industries that employed 2 to 200 staff in tourism-related businesses. There seems to be a lack of skills and widespread use of ICT, even though there are more than adequate facilities available such as high-speed internet connection. This finding is commensurate with other regional Australian tourism industries (Braun, 2004). Wang's (2008) research discovered that communication skills were ranked higher than the importance of IT skills by tourism employers. Our research discovered that ICT was an underused tool, so training institutions need to stress the importance to future employees to continually develop these skills.

Recommendations: improve ICT competency by using non-profit organisations such as chambers of commerce and libraries that offer free or low-cost workshops for tourism-specific training, rather than specialised IT skills. Course providers such as Coursera, edX and Skillshare and other open courses and webinars provided by universities and other training institutions could be used when particular skills shortages are identified.

China Ready® Accreditation Program

It was identified in the knowledge sharing workshop and surveys of the South West, that the Program has been poorly accepted, or not yet considered. The accreditation, while not costly for most, may be prohibitive for some small and semi-retired operators.

Therefore, this research assessed the online program and its application requirements.

The initial video that program participants watch was perceived as instructional and unfriendly. In general, the program tone was seen to be authoritative and devoid of the unique Australian and regional perspectives and limitations, such as access to training and the challenges faced by small tourism operators. Throughout the program, and accreditation application process, there are terms and phrases that may not be familiar to an applicant. For example, the term 'meaningful way' was used several times, but not explained or defined. While there is assistance from the Tourism Council of WA, who recommends the China Ready® program to tourism operators, the South West cohort indicated that ICT competency was varied in the region, and for some that made understanding the program's online application and upload requirements challenging. Overall, the content of the training appeared to be out of date and needed to keep pace with the changing needs of Chinese travellers.

Recommendation

Rather than just China Ready®, the accreditation program should be Tourist Ready, catering for many different nationalities, but targeting the top five or ten international tourist markets visiting WA.



Discussion

and conclusion

Discussion and conclusion

In this section we draw together the various stages of our research project on the experiences and behaviours of Chinese visitors to WA. We present a number of conclusions and recommendations which might help industry decision makers in formulating strategies to encourage this potentially lucrative market.

Who are our Chinese visitors and China's middle class — the principal engine of consumer power

WA's Chinese visitors are a young cohort. About 78 per cent of Chinese visitors were aged between 18 to 45 years, with 37 per cent aged between 25 to 34 years. This group of 25 to 34 year olds are the single-child Millennials, or Generation Y. They are usually the centre of their family and have more freedom and financial support from their family to travel abroad. Even so, they are extremely cost conscious.

In addition, China's population is ageing. The retirement age for males is 60 years and 50 to 55 years for females. These retirees are cash-rich, time-rich and have the freedom to develop hobbies, such as photography, bush walking, bird watching, fishing, and art. They represent a fast-growing segment for outbound travel, especially special interest group tours.

How did Chinese visitors access travel information?

Most Chinese visitors were found to be technologically advanced and used a wide variety of online resources to research and plan their trips, and then used social media heavily while here to share their life experiences with friends and family at home. A number were influenced by celebrity endorsements of specific locations, but in general WA tourism does not have a high profile.

We recommend several nuanced marketing strategies to attract Chinese visitors:

- Increase social media conversations that share WA tourism information. Tourism WA has its own Wechat account. In order to optimise this marketing opportunity, photographic and video competitions can be used to increase the profile of WA. Wechat followers could view and vote on the best submissions on topics such as the Chinese pursuit of joy, peace of mind or paradise, or the loneliest place in WA. Such incentives would encourage Wechat users to forward their WA photo or video to at least, say, five of their friends, in return for a small reward.
- Daily social media tips for travelling in and around WA would keep this destination at the front of the mind.
- Some Chinese visitors noted that enhanced photographs and videos promoting WA scenery contrasted significantly with reality. Therefore, tourism marketing and advertising needs to be accurate and current.
- Chinese visitors favour public transport in their home cities, so advertising should be prominent on public transport in at least the top ten cities of origin in China: Beijing, Guangzhou, Hong Kong, Shanghai, Nanjing, Taipei, Shenzhen, Anhui, Wuhan and Tianjin.
- Some Chinese visitors said it was difficult to find WA travel itineraries on Chinese travel websites. These itineraries are vital marketing tools that make it easy for visitors to plan their journey and would help hook potential visitors early in the decision-making process.

How can we help Chinese visitors shop effectively?

In this study, we found that around 36 per cent of respondents from the intercept survey rated their shopping experience as average or below. In order to improve this situation, some points to consider include:

- Key products purchased by visitors: food and drinks, such as nougat, honey, milk powder and wines; healthcare and beauty products, such as Jurlique, lanolin oil and supplements; and souvenirs, such as, commemorative coins, fridge magnets and handicrafts.
- Many Chinese visitors complained that shops are closed too early in WA. They suggested that retail trading hours should be extended to 6:30pm every night and longer trading hours on Sunday. However, we may also need to look at an integrated ecosystem of online/retail shopping, which includes social media such as Wechat's online payment system and other payment systems such as Alipay, Tmall, and Taobao.
- The profile of Chinese visitors to WA includes a significant proportion of fully independent travellers (FIT), who have sophisticated shopping tastes and may require WA retailers to prepare more interesting, unique and personalised products. These Chinese shoppers come mainly from Tier 1 Cities, such as Beijing, Shanghai and Guangzhou. In our survey, a quarter of respondents belonged to this group. Some of them complained about the lack of diversity in their shopping experience.
- Visitors coming from Tier 2 cities, such as Nanjing, Wuhan, Anhui and Shenzheng, may be cash-rich but time-poor and operate on a very tight schedule. They may be willing to buy high-end luxury products, such as jewellery, watches, bags, shoes, clothing and phones. To accommodate this market segment it is vital for retailers to appreciate their imperatives beforehand and provide efficient services to them when they present in the shop.
- This study found that word-of-mouth, recommendations from family and friends, and online ratings played a significant role in selecting destinations and itineraries. This can be encouraged by providing more public WIFI so visitors can share their experiences more effectively through social media and other online forums.
- From this study, females spent the most, by proportion and in total. Keeping products attractive and relevant to this market is key to retail success.

Other recommendations

Our surveys showed that, in general, Chinese visitors enjoyed their time in WA. The State offers a clean and safe environment, flora and fauna found nowhere else, open spaces and lack of crowding, friendly locals, fresh food, and the ability to travel independently and safely. To build on this solid basis and grow the market, some key recommendations arise from this report:

- Chinese visitors to WA are relatively wealthy, but international tourism remains a luxury product. Therefore, visitors want to make the most of their time, doing and seeing as many different things as possible. Long journeys between points of interest should be balanced with shorter, local activities.
- In general, Chinese visitors are technologically advanced and use a wide variety of online resources to research and plan their trips, but many said online information on WA was scarce or out of date. Therefore, effective use of social media and other online resources will better promote WA and influence early trip decisions.
- While there are some broadly common characteristics among the respondents to our surveys, there are enough differences in age, income, and interests to suggest that a one-size-fits-all marketing campaign will not be cost-effective. For example, based on stated incomes, visitors from Shanghai, Tianjing, Guangzhou, Beijing and Hong Kong should be targeted for high-end retail products, but the same campaign may fail in, for example, Wuhan.
- Free public WIFI is assumed, but is often not available, even at some hotels. For a largely family-oriented society it is important for visitors to stay in touch with friends and family in China and to share their trip in the moment, but this is not always possible. In addition, timely posting of travel diaries and photos or videos of WA on social media are valuable advertising for the State.
- While most visitors are happy to try new food experiences, they would equally welcome at least one familiar, home-style meal each day. Hotels and accommodation venues taking Chinese bookings should research alternative breakfast options to meet these expectations.
- Many visitors complained of poor mobile phone signals in most regional areas. Some said this made them feel unsafe as they did not know what to do in an emergency situation. It seems likely that these individual tourists are not well informed on how to ask for help and what to do in an emergency. These details could be added to welcome packs at hotels, other accommodation places, and possibly on incoming flights.
- Typical hotel welcome packs for Chinese tourists should include a kettle and Chinese herbal tea sachets, instant noodles, and a welcome guide in Chinese language.
- Perth is in the same time zone as all of China, making Perth the ideal first or final stop of an Australian itinerary, however many Chinese visitors were unaware of this. An opportunity exists to make this more prominent in marketing materials.
- Beijing is the point of origin of most respondents in this survey, but there are no direct flights. An opportunity exists to tap into this direct channel, both for tourism and business, if airlines could be persuaded to introduce direct services.

- Multilingual signs should be placed in tourist precincts, public transport, and at major tourist attractions.
- The maps in Figure 23 to Figure 27 offer a spatial dimension to help policy makers in infrastructure, transportation, and tourism in designing strategies and where to focus finite resources.
- Well informed and engaging tour guides are vital in keeping their visitors happy on their trip and keen to recommend WA to future tourists when they return home, yet there is little regulation. The occupation needs a more professional footing with prescribed training and standards.
- Improve ICT competency by using non-profit organisations such as chambers of commerce and libraries that offer free or low-cost tourism-specific training, rather than specialised IT skills. Course providers such as Coursera, edX and Skillshare and open courses and webinars provided by universities and other training institutions could be used when particular skills shortages are identified.
- Satellite business offices be established in the main regional centres, where interpreting skills can be utilised for larger tour groups and recruited and dispersed accordingly during peak seasons.

Our research represents a first stepping stone into understanding the behaviour and expectations of Chinese visitors coming to Western Australia. If this market can be fully exploited, the financial benefits to the State could be significant and help smooth the boom-and-bust cycle inherent in resource-based economies. Therefore, as the South West tourism providers called for, there needs to be a commitment to further ongoing research into this vital area.

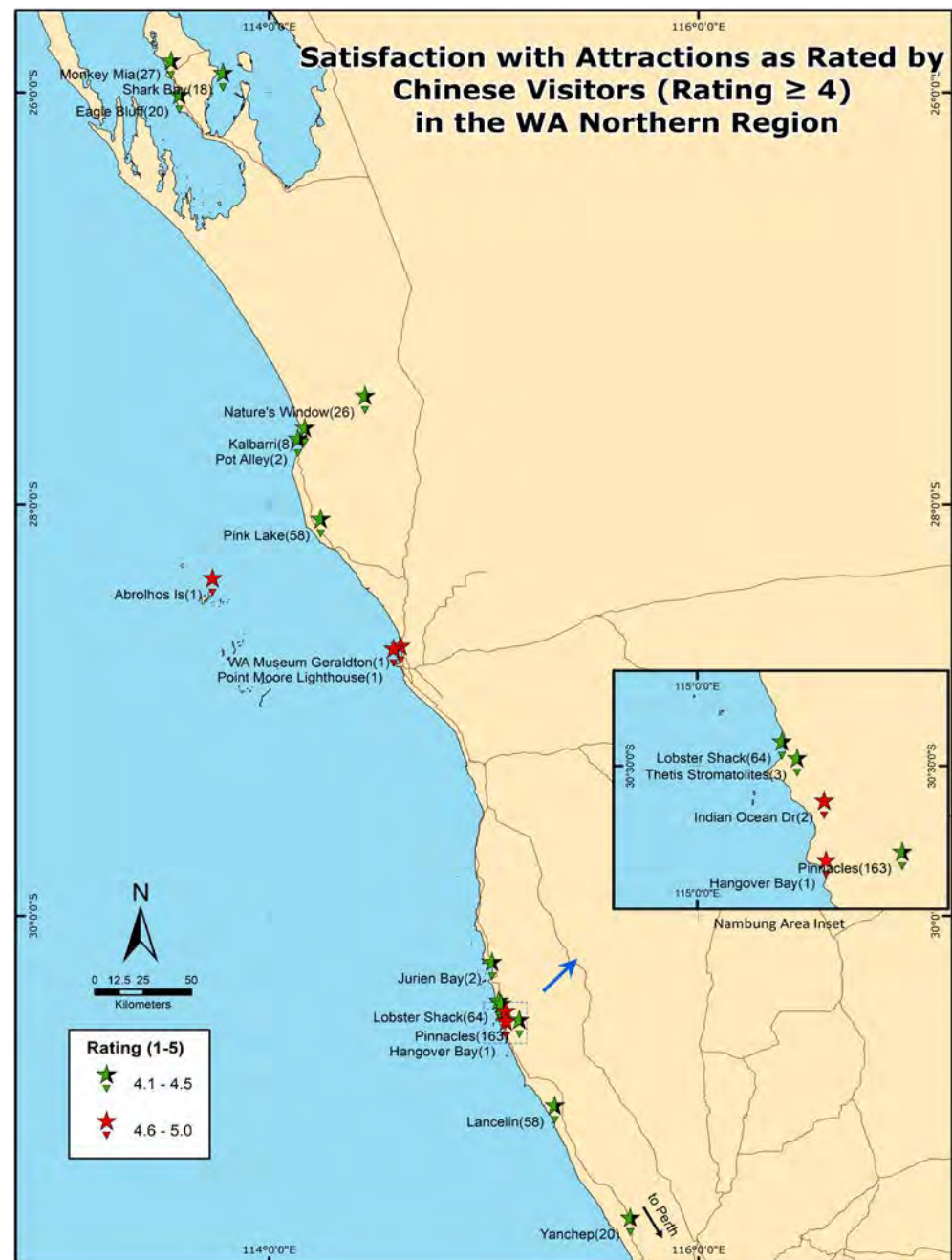


Appendix

Satisfaction levels of WA attractions by regions

The following maps show the satisfaction with attractions rated by Chinese visitors for northern WA, southern WA and Perth regions.

Figure 28 Satisfaction with attractions by Chinese visitors in northern WA (rating >4)



Source: Authors' own calculations from the PAIO survey.

Figure 29 Satisfaction with attractions by Chinese visitors in northern WA (rating ≥ 1 and ≤ 4)



Source: Authors' own calculations from the PAIO survey.

Satisfaction with Ratings as Rated by Chinese Visitors (Rating ≥ 4) in the Perth Metropolitan Area

The map displays the Perth Metropolitan Area with various locations marked by stars indicating satisfaction ratings. The legend indicates that green stars represent a rating of 4.1 to 4.5, and red stars represent a rating of 4.6 to 5.0. The map includes a scale bar (0 to 4 Kilometers) and a north arrow. The inset map shows the entire Perth Metropolitan Area, including Rottnest Island and the Swan River.

Location	Rating
Port Beach	4.6 - 5.0
Fremantle	4.1 - 4.5
Perth CBD	4.1 - 4.5
Swan River	4.1 - 4.5
Rottnest Island	4.6 - 5.0
Little Salmon Bay	4.6 - 5.0
Cathedral Rocks	4.6 - 5.0
Port Beach	4.6 - 5.0
Fremantle	4.1 - 4.5
Perth CBD	4.1 - 4.5
Swan River	4.1 - 4.5
Rottnest Island	4.6 - 5.0
Little Salmon Bay	4.6 - 5.0
Cathedral Rocks	4.6 - 5.0

Figure 31 Satisfaction with attractions by Chinese visitors in Perth metropolitan area (rating ≥ 1 and ≤ 4)



Figure 32 Satisfaction with attractions by Chinese visitors in South West WA (rating >4)



Source: Authors' own calculations from the PAIO survey.

Figure 33 Satisfaction with attractions by Chinese visitors in South West WA (rating ≥ 1 and ≤ 4)



Source: Authors' own calculations from the PAIO survey.

Top 10 itineraries written by Chinese diarists on Mafengwo and Ctrip websites

The following tables show the top itineraries written by Chinese diarists on the Mafengwo and Ctrip websites. The tables are ranked by the number of people who liked the itinerary.

Table 8 4-day itinerary (1,085 likes)

Starting point	Duration	Region		
Caversham Wildlife Park	4 days	Whiteman – Perth		
	Attraction	Duration	Activity	Region
Day 1	Caversham Wildlife Park	3 hrs	Visiting and other activity	Whiteman
Day 2	Swan Valley	1 hr	Visiting and wine tasting	Perth
Day 3	Swan River	5 hrs	Walk and shopping	Perth
Day 4	Kings Park	1 hr	Walk	Perth
Day 4	The University of Western Australia	3 hrs	Visiting and other activity	Perth

Source: Perth International Airport intercept and online survey 2017.

Table 9 9-day road trip itinerary (south of Swan River) (498 likes)

Starting point	Duration	Region		
Caversham Wildlife Park	4 days	Whiteman – Perth		
	Attraction	Duration	Activity	Region
Day 1	Caversham Wildlife Park	3 hrs	Visiting and other activity	Whiteman
Day 2	Swan Valley	1 hr	Visiting and wine tasting	Perth
Day 3	Swan River	5 hrs	Walk and shopping	Perth
Day 4	Kings Park	1 hr	Walk	Perth
Day 4	The University of Western Australia	3 hrs	Visiting and other activity	Perth

Source: Perth International Airport intercept and online survey 2017.

Table 10 5-day road trip itinerary (south of Swan River) (451 likes)

Starting point	Duration	Region		
Perth to York	5 days	Perth – York – Hyden – Borden – Albany – Carnarvon – Denmark – Pemberton – Augusta – Margaret River – Busselton		
	Attraction	Duration	Activity	Region
Day 1	Heading to York	1.5 hrs	Road Trip	Perth – York
Day 1	York Town	4 hrs	Walk	York
Day 1	Wave Rock	2 hrs	Scenery viewing	Hyden
Day 2	Bluff Knoll, Stirling Range National Park	3 hrs	Scenery viewing	Borden
Day 2	Emu Point	2 hrs	Walk	Albany
Day 2	Middleton Beach	2 hrs	Scenery viewing	Albany
Day 3	Torndirrup National Park	2 hrs	Walk	Albany
Day 3	The Gap and Natural Bridge	1 hr	Walk	Albany
Day 3	Blowholes	1 hr	Walk	Carnarvon
Day 4	Valley of the Giants	1 hr	Walk	Denmark
Day 4	Gloucester tree	1 hr	Walk	Pemberton
Day 4	Cape Leeuwin Lighthouse	1 hr	Scenery viewing	Augusta
Day 5	Winery	2 hrs	Visiting and other activity	Margaret River
Day 5	Busselton Jetty	1 hr	Walk	Busselton
Day 5	Way back to Perth	1.5 hrs	Road Trip	Busselton – Perth

Source: ID 162.

Table 11 7-day road trip itinerary (north & south of Swan River) (427 likes)

Starting point	Duration	Region		
Perth	7 days	Perth - Jurien Bay - Yallabatharra - Kalbarri - Geraldton - Cervantes - Nambung - Rottnest Island - Busselton - Margaret River - Fremantle		
	Attraction	Duration	Activity	Region
Day 1	Heading to Jurien Bay	2.5 hrs	Road Trip	Perth - Jurien Bay
Day 1	Jurien Bay	2 hrs	Scenery viewing	Jurien Bay
Day 1	Hutt Lagoon (Pink Lake)	2 hrs	Scenery viewing	Yallabatharra
Day 1	Kalbarri National Park	4 hrs	Scenery viewing	Kalbarri
Day 2	Geraldton	1 day	Visiting and other activity	Geraldton
Day 3	Lobster Shack	2 hrs	Dining	Cervantes
Day 3	Nambung National Park - Pinnacles	2 hrs	Walk	Nambung
Day 3	Back to Perth	1.5 hrs	Road Trip	Perth
Day 4	Rottnest Island	1 day	Visiting and other activity	Rottnest Island
Day 5	Busselton Jetty	3 hrs	Walk	Busselton
Day 6	Winery	5-6 hrs	Walk	Margaret River
Day 7	Fremantle Markets	2 hrs	Walk	Fremantle

Source: ID 71.

Table 12 6-day road trip itinerary (north and south of Swan River) (422 likes)

Starting point	Duration	Region		
Perth	6 days	Perth - Balingup - Nannup - Augusta - Busselton - Rockingham - Cervantes - Nambung		
	Attraction	Duration	Activity	Region
Day 1	Heading to Balingup	1 day	Road Trip	Perth - Balingup
Day 2	Nannup town	1 day	Visiting and other activity	Nannup
Day 3	Cape Leeuwin Lighthouse	2.5 hrs	Scenery viewing	Augusta
Day 3	Busselton Jetty	2 hrs	Scenery viewing	Busselton
Day 3	Rockingham Beach	2 hrs	Scenery viewing	Rockingham
Day 4	Back to Perth	1 day	Road Trip	Perth
Day 5	Lake Thetis Stromatolites	2 hrs	Walk	Cervantes
Day 5	Nambung National Park-Pinnacles	4 hrs	Walk	Nambung
Day 6	Kings Park	1 day	Walk	Perth

Source: ID 42.

Table 13 6-day road trip itinerary (north and south of Swan River) (396 likes)

Starting point	Duration	Region		
Fremantle Markets	6 days	Perth – Fremantle – Rottnest Island – Yanchep – Cervantes – Nambung – Jurien Bay – Lancelin		
	Attraction	Duration	Activity	Region
Day 1	Fremantle Markets	1 day	Shopping	Fremantle
Day 2	Rottnest Island	1 day	Surfing	Rottnest Island
Day 3	Rottnest Island	Half day	Cycling	Rottnest Island
Day 3	Perth CBD	2 hrs	Walk	Perth
Day 4	Yanchep National Park	1.5 hrs	Visiting and other activity	Yanchep
Day 4	Lobster Shack	0.5 hrs	Visiting and other activity	Cervantes
Day 4	Lake Thetis Stromatolites	0.5 hrs	Walk	Cervantes
Day 4	Nambung National Park-Pinnacles	1 hr	Walk	Nambung
Day 4	Kangaroo Points	0.5 hrs	Walk	Nambung
Day 5	Lesueur Walk Trail, Mount Lesueur	2.5 hrs	Walk	Jurien Bay
Day 5	Lesueur National Park	0.5 hrs	Walk	Jurien Bay
Day 5	Thirsty Point Look Out	1 hr	Walk	Cervantes
Day 5	Lancelin Sand Dunes	0.5 hrs	Walk	Lancelin
Day 6	Lake Monger	1 hr	Scenery viewing	Perth
Day 6	The University of Western Australia	1 hr	Walk	Perth
Day 6	Kings Park	2 hrs	Visiting and other activity	Perth
Day 6	The Bell Tower	30 mins	Walk	Perth
Day 6	Northbridge	3 hrs	Visiting and other activity	Perth

Source: ID 191.

Table 14 8-day road trip itinerary (north and south of Swan River) (380 likes)

Starting point	Duration	Region		
Perth CBD	8 days	Perth – Fremantle – Busselton – Augusta – Denmark – Albany – Esperance – Kalgoorlie		
	Attraction	Duration	Activity	Region
Day 1	King's Park	2 hr	Walk	Perth
Day 1		30 mins	Walk	Perth
Day 1	London Court	30 mins	Walk	Perth
Day 1	DNA Tower	30 mins	Walk	Perth
Day 2	Fremantle Art Centre	1 hr	Visiting and other activity	Fremantle
Day 2	Fremantle Prison	30 mins	Heritage visiting	Fremantle
Day 2	Busselton Jetty	1 hr	Walk	Busselton
Day 2	Cape Naturaliste Lighthouse	30 mins	Walk	Naturaliste
Day 3	Cape Leeuwin Lighthouse	1 hr	Walk	Augusta
Day 3	William Bay National Park	1 hr	Walk	Denmark
Day 3	Greens Pool	30 mins	Scenery viewing	Denmark
Day 3	Elephant Rocks	30 mins	Scenery viewing	Denmark
Day 3	Dog Rock	10 mins	Scenery viewing	Albany
Day 4	Mount Clarence	1 hr	Heritage visiting	Albany
Day 4	The University of Western Australia (Albany Campus)	30 mins	Scenery viewing	Albany
Day 4	Albany Wind Farm	30 mins	Scenery viewing	Albany
Day 4	Torndirrup National Park	1 hr	Walk	Albany
Day 5	Cape le Grand National Park	3 hrs	Walk	Esperance
Day 5	Winery & Chocolate factory	1 hr	Walk	Esperance
Day 5	Great Ocean Drive	3 hrs	Walk	Esperance
Day 6	Heading to Kalgoorlie	4 hrs	Road Trip	Esperance - Kalgoorlie
Day 6	The Super Pit	1 hr	Scenery viewing	Kalgoorlie
Day 6	Mount Charlotte	45 mins	Scenery viewing	Kalgoorlie
Day 7	Elachbutting Rock (Wave Rock)	1 day	Walk	Westonia
Day 7	Heading to Perth	4.5 hrs	Road Trip	Perth
Day 8	Rottneest Island	1 day	Scenery viewing	Rottneest Island
Day 8	Little Salmon Bay	30 mins	Walk	Rottneest Island
Day 8	Geordie Bay	30 mins	Scenery viewing	Rottneest Island
Day 8	Cathedral Rocks	30 mins	Scenery viewing	Rottneest Island

Source: ID 71.

Table 15 6-day road trip itinerary (north and south of Swan River) (357 likes)

Starting point	Duration	Region		
London Court	6 days	Perth – Nambung – Hyden – York – Fremantle – Rottnest Island		
	Attraction	Duration	Activity	Region
Day 1	London Court	2 hours	Walk	Perth
Day 1	Northbridge	1 hr	Shopping	Perth
Day 1	Pert CBD – Perth Mint, Town Hall and gardens	Half day	Walking and Shopping	Perth
Day 1	The Bell Tower	30 mins	Scenery viewing	Perth
Day 1	Swan River	1 hr	Scenery viewing	Perth
Day 2	Lake Monger	30 mins	Walk	Perth
Day 2	Nambung National Park-Pinnacles	2 hrs	Walk	Nambung
Day 2	Kings Park	1 hrs	Walk	Perth
Day 3	Heading to Wave Rock	4 hrs	Road Trip	Perth - Hyden
Day 3	Wave Rock	2 hrs	Walk	Hyden
Day 3	Way back to Perth	4 hrs	Road Trip	York - Perth
Day 4	Fremantle Markets	3 hrs	Visiting and other activity	Fremantle
Day 4	The University of Western Australia	1 hr	Walk	Perth
Day 5	Rottnest Island	1 day	Visiting and other activity	Rottnest Island
Day 6	Perth Culture Centre	2 hrs	Visiting and other activity	Perth
Day 6	Kings Park	3 hours	Walk	Perth

Source: ID 106.

Table 16 6-day road trip itinerary (north and south of Swan River) (352 likes)

Starting point	Duration	Region		
Perth CBD	12 days	Perth – Rottnest Island – Yanchep – Mandurah – Busselton – Augusta – Margaret River – Mandurah – Nambung – Kalbarri – Monkey Mia – Coral Bay – Bunbury – Greenough		
	Attraction	Duration	Activity	Region
Day 1	Perth CBD	1 day	Shopping	Perth
Day 1	London Court	30 mins	Walk	Perth
Day 2	Rottnest Island	1 day	Walk	Rottnest Island
Day 3	Fisherman's Hollow	5 hrs	Fishing	Yanchep
Day 3	Egret Point	5 hrs	Fishing	Mandurah
Day 3	Busselton Jetty	2 hrs	Scenery viewing	Busselton
Day 4	Cape Leeuwin Lighthouse	1 hr	Scenery viewing	Augusta
Day 4	Voyager Estate Winery	2 hrs	Shopping	Margaret River
Day 5	Egret Point	5 hrs	Fishing	Mandurah
Day 5	Nambung National Park - Pinnacles	2 hrs	Scenery viewing	Nambung
Day 6	Hutt Lagoon (Pink Lake)	1 hr	Walk	Kalbarri
Day 6	Kalbarri National Park	2 hrs	Visiting and other activity	Kalbarri
Day 6	The Loop and Z Bend	1 hr	Visiting and other activity	Kalbarri
Day 6	Nature's Window	30 mins	Visiting and other activity	Kalbarri
Day 7	Kalbarri National Park	2 hrs	Abseiling	Kalbarri
Day 7	Shell Beach	1 hr	Scenery viewing	Kalbarri
Day 9	Monkey Mia Resort	3 hrs	Visiting and other activity	Monkey Mia
Day 10	Coral Bay	1 day	Diving	Coral Bay
Day 11	Coral Bay	3 hrs	Snorkelling	Coral Bay
Day 12-14	Back to Perth	5 hrs	Visiting and other activity	Greenough

Source: ID 43.

Table 17 5-day road trip itinerary (south of Swan River) (310 likes)

Starting point	Duration	Region		
King's Park	5 days	Perth – Fremantle – Margaret River – Rottnest Island		
		Duration	Activity	Region
Day 1	Kings Park	3 hrs	Visiting and other activity	Perth
Day 2	Fremantle	5 hrs	Walk	Fremantle
Day 2	Caversham Wildlife Park	5 hrs	Visiting and other activity	Whiteman
Day 3	Winery & Chocolate Factory	1 hr	Visiting and other activity	Margaret River
Day 3	Feral Brewing Company	1 hr	Visiting and other activity	Baskerville
Day 4	Rottnest Island	1 day	Cycling	Rottnest Island
Day 4	Crown Casino	3 hrs	Visiting and other activity	Perth
Day 5	Winery	2 hrs	Visiting and other activity	Margaret River
Day 5	Prevelly Beach	2 hrs	Visiting and other activity	Margaret River
Day 5	Leeuwin Estate Gourmet Village	3 hrs	Visiting and other activity	Margaret River

Source: ID 85.



Glossary

and technical notes

Glossary and technical notes

China ready survey

This study conducted a survey and China ready workshop to identify the barriers, knowledge and other gaps to prepare tourism providers for Chinese visitors to Western Australia.

The survey can be viewed here:

https://curtin.au1.qualtrics.com/jfe/form/SV_0xqFZdhUa62Y8zb



Here is the description of the survey.

Are We China Ready?

Thank you for taking the time to answer a few questions about whether your organisation is China ready. Your voice is very important for us to understand our Chinese guests and their trip experiences in Western Australia.

Curtin University Human Research Ethics Committee (HREC) has approved this study (HREC number HRE2017-0200-02).

Should you wish to discuss the study with someone not directly involved, in particular, any matters concerning the conduct of the study or your rights as a participant, or you wish to make a confidential complaint, you may contact the Ethics Officer on (08) 9266 9223 or the Manager, Research Integrity on (08) 9266 7093 or email hrec@curtin.edu.au.

For further inquiries about the study or any matter in relation to this research, please contact:

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China's tiered city system

The Chinese government doesn't have an official definition for its city tier system, and many businesses use slightly different methods for classification such as Gross Domestic Product (GDP), political administration, population size, development of services, infrastructure, cosmopolitan nature, retail sales etc.

For the purposes of this report, we have adopted Wine Australia's tier system.

Chinese holiday visitors

We define Chinese holiday visitors as those who visit Western Australia with a trip purpose of holiday and leisure. Holiday visitor respondents were chosen for their status as overnight travellers away from home for less than 12 months. We used Tourism Research Australia International Visitor Survey (IVS) data using Computer Assisted Personal Interviewing (CAPI) of Chinese visitors in the departure lounges of Perth International Airport.

Chinese travel websites

This study has extracted trip diaries from nine Chinese websites:

Mafengwo:	www.mafengwo.cn
Ctrip:	www.ctrip.com
TripAdvisor:	www.tripadvisor.com.au
Tuniu:	www.tuniu.com
Qunar:	www.qunar.com
Sina Travel:	www.sinaworldtravel.com
Alitrip:	www.alitrip.com
Lvmama:	www.lvmama.com

Chinese trip diarists

Chinese visitors wrote and published their trip experiences on Chinese travel websites during or after their visits in Western Australia.

Fully Independent Travellers, or Free Independent Travellers, or Frequent Independent Travellers or Foreign Independent Travellers (FIT)

This term refers to independent travellers who do not use travel agencies and design their own itineraries through detailed research before or during the trips.

Geographic Information Sciences (GIS)

This is a computer application capable of performing virtually any conceivable operation on geographic information, from acquisition and compilation through visualisation, query, and analysis to modelling, sharing, and archiving (Longley, 2005).

Inbound tour

Group of travellers whose trip originated in another city or country.

Perth Airport Intercept and Online (PAIO) Survey

In this study, we conducted an intercept survey at Perth International Airport and online. The respondents were defined as these who are away from China for less than 12 months.

Tourist attractions

These are destinations for visitors' excursions and routinely accessible to visitors during opening hours. Other definitions exclude retail shops, sports stadiums, theatres and cinemas, as these meet a wider purpose, although in practice tourists may consider the excluded categories to be tourist attractions.

Tourism infrastructure

Roads, railway lines, harbours, airports, water, electricity, other power facilities, sewerage disposal and other utilities to serve not only the local residents but also the tourist accommodation, restaurants and passenger transport terminals.



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